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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

DOCUMENTS DEPT.

ONE STOP COMMITTEE OF THE
WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board

MAY 23 2001

Thursday, May 3, 2001

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DRAFT MINUTES

The Meeting of the One Stop Committee was held at 801 Turk Street, Golden Gate Room, San Francisco, CA. Notice and Agenda for this meeting were mailed/published/made available to public on April 26, 2001.

Committee Members in Attendance:

Rosalie Bulach, Chairperson; William Allen; Jim Buick; Craig King; Phyllis McGuire; Tamara Osheroff; John Poremba; Luciana Profaca;

Committee Members Absent:

Steve Arcelona; Anni Chung; Nicholas de Lorenzo; Nathaniel Mason; and Marion Standish

Staff in Attendance: Cathy deCristofaro; Raymond Holland; and Clara Wong

Others in Attendance (as evidenced by sign-in sheet*):

Mr. Barbieri Barbieri, Susan S. Beal, *JDB & Associates*, Jay Townsend, Ting Yee, Bernard Leung, Tony Lugo, Greg Johnson, Anne G. Politeo.

The Meeting was called to order by Committee Chairperson Bulach at 8:00 a.m.

Motion to Adopt the Agenda was proffered by Jim Buick, and seconded by John Poremba. Motion, without further discussion, carried unanimously.

Motion to Adopt the Minutes was proffered by John Poremba, and seconded by Phyllis McGuire.

Chairperson Bulach then asked if there was any public testimony on Agenda Items. None was offered.

Agenda Item: Develop recommendations for One Stop Service Delivery System

Mr. Barbieri, consultant to the Private Industry Council, Inc., facilitated the discussion, as outlined in the agenda, after providing a brief background of the process to-date, including an overview of the last meeting of the One Stop Committee on April 20, 200. Mr. Barbieri presented some potential strategies for advancing the discussion. He also stated that the intent of today's meeting was to discuss and clarify the recommendations that would be presented as action items at the next meeting of this Committee. Additionally, Mr. Barbieri reminded the Committee that these recommendations for the design of the system would be considered a starting point for future strategies.

Using as a guideline for discussion, Mr. Barbieri referenced the Presentation Summary, included in the meeting materials. Beginning with the first item, "Design of the System," Ray Holland suggested that in defining the role of the Workforce Investment Board as responsible for the system, "we should add a statement that further defines the responsibility as, 'in partnership with the Mayor...'" Ms. Bunim recommended that, in order to advance the discussion, Mr. Holland discuss this matter more fully with her and Pamela Calloway at another time.

Mr. Barbieri: On page one, the third bullet - it was agreed that the wording should be revised from "the partners recommended that the LWIB would fund the basic infrastructure, to read, "the partners recommended that the LWIB would *offer some level of funding* to the basic infrastructure." Mr. Barbieri asked if anyone was opposed to this final statement being approved as a recommendation to be included on the agenda for the next meeting. There were no opposing comments.

Mr. Barbieri continued, reading, "it is recommended that the role of the "full service" Center is to provide at a minimum the core services described in the WIA (Section 662.240 of the Final Regulations)." A list of such services is included in your materials for your review. It is also recommended that intensive services also be available through the full service center, and that training services be accessible. The minimum services described here are to insure that we are in compliance with the Act. It is then recommended that there shall be two levels of access to the One-Stop System; full service center and satellites. A Satellite is a site that offers something less than full service as defined by WIA. Currently this would include the two site located at Franklin Street and in Southeast as well as all of the "Access Points".

Mr. King noted that an Access Point definition had already been developed, and asked if it had been considered in the discussion with the partners. Ms. DeCristofaro said that copies of that exact definition had been distributed to all the partners while discussing these recommendations. Mr. Barbieri added that "the role of a satellite is to provide universal access to information about services available through the One-Stop system and referrals to the system. Where available, satellites could also provide access to some services." He added that, "those services that must be provided at a full service center are listed on page two. We went through the list and then passed it on to you from the One Stop partners meeting, but then we noticed, "gee, there's no employer services listed, no business services listed, so that gives you a lead in to why we're talking about satellite centers. The Federal law is not all comprehensive; there are things in San Francisco that want to provide business services and they all end up being satellite centers, they each have a different purpose. That's part of what a system is, as opposed to a physical One Stop full service center. Does that make sense?

Ms. Bunim: I think if we keep the big picture in mind, my experience with things like this, when you're starting (although you're sort of re-starting) is let's do what we do, and let's do it really well, and given that we're going to have limited resources, I think the idea that the law has prescribed this anyway, that we take this step to launch it and do it well, given the resources that we have. And then Jonathan's point that in a year or two from now, who knows what's going to happen with funding, we can do some things down the road. If we can grow the pie, great. But I think we should always have in mind that what we want to do is first rate, top quality work for everyone concerned. As long as we support that vision we will be successful.

Mr. Barbieri: Did we complete our point on business services? That it would be a recommendation, it would be offered (and as yet undefined) in the full service center. Ms. deCristofaro: You alluded to that. Mr. Barbieri: I'm trying to clarify that. Are people saying that

they want that to be a recommendation at this point? Or would you rather not? Chairperson Bulach: I would think you would have to. Mr. Holland: So we're basically suggesting that the full service center would go beyond that to provide services not required by the law...

Ms. deCristofaro: to include... Mr. Barbieri: to include employer/business services, as of yet undefined. We don't know what it is, but we know we will be offering something to the business community. Mr. Poremba: At the One Stop Center. Mr. Barbieri: Yes, at the 3120. Mr. Poremba: I don't know if I agree with that. Mr. Barbieri: Good! Mr. Poremba: I'm going to say that because in some instances the location of your Center drives who will use that center, as your customer. And is the outer Mission the place to put a business/employer Center, for resources? Is that the most convenient place for employers to come to access those services?

Chairperson Bulach: I don't think the employer should ever have to go there, to the physical site. They could access it through the Internet. Employers need one place to go, and that's the One Stop. Without having that, the rest is all off, because you have to find the customers that you want to provide the service to. If you don't have the customers, why have a One Stop?

Mr. Poremba: I agree with that, but I also think that there are some services... I'll refer to Marin's Business Resource Center. They actually run seminars for business people, where employers do come on site. Or in Sonoma County, where they have the small business development Center, and those conference rooms are filled with entrepreneurs attending classes on site. I'm just wondering, is the commitment to say that we're going to put the employer/business services in the One Stop Center on Mission Street going to limit our ability to provide the service where that customer wants it

Mr. Barbieri: I think it's a good point and maybe in the spirit of how the entire approach is being taken by the Committee at this point, maybe the commitment is that employer/business services shall be offered, and acknowledge that there needs to be some research and evaluation of what that is, and how, and where. That's one way to take this step, because it seems that the commitment is certainly for it, but there's a difference, and the point well taken, the whole question of, where's the access? Where are people going to actually use it, not just electronically, but physically, is a key consideration.

Ms. McGuire: I suggest taking a step further, and say that it's information about the employer/business services is going to be available at the full service, getting back to John's point about where services are physically located. Here in San Francisco, there is also a Small Business Development Center, actually there's now two sites. There's one downtown, and there's one out in my neighborhood. They have seminars, etc. So if I'm an employer, I want to know about that, then the full service One Stop should have that information. You contact the One Stop, and you (as the employer) are referred to the service that you want.

Mr. Allen: As an employer, I don't know if I'm off base here... but we are looking for the "one stop." You're saying "one stop" and I'm hearing all these other things, and you're making it very difficult. The employers do go to the sites, I know we do, we do testing here, so looking at the spectrum of things from employer to employee, everything that happens between them is the conduit. So make it as easy as possible. Most of your companies, in fact we do testing for almost everything now, and throughout the states that I work with, we go to EDD. In L.A., we're hand in hand. They do everything for us, as strictly ONE STOP. So we do our testing there, employees go there, we even meet there. So anything that you take away from that hub, is going to be an inconvenience for that employer.

Mr. Buick: A suggestion on this... if we change it from "services be offered AT..." to "services offered THROUGH" so that services will be offered there, or you could be referred to another site.

Mr. Barbieri: Let me ask a clarification question. Do you want to make the commitment that there will be physical locations for employer/business services, and not try to determine that today, versus just making the information available?

Ms. Osheroff: I hear both sides as well – it's very important to have the services physically located, but to have the information hub as well. I think employer's need one point of contact, and I like the word "through" too. It doesn't matter where we go if we're looking for something, whether it's a seminar or testing – we need one information point, that every time we call we will be directed to the right place. Physically, we could be going anywhere.

Mr. Allen: There's times when, and not just for one company, if you want professional services you want feedback you need one person to go to, in that one office. If you had that, you could develop other training programs also. I don't mean for the companies, I mean what better training could you provide to make the job candidates better prepared.

Mr. King: John, don't you have an employer services unit and where is it located? Mr. Poremba: Yes, and it's located in this building. We've concentrated on client services, but we still provide the services that you are referring to since leaving Mission St., because those services are employer related. If you're talking about getting together the person who's looking for a job with an employer, and the best place to do that is where you have the customer who's looking for a job. So that makes sense.

Chairperson Bulach: Two and a half years ago we had a San Francisco small business forum, and what come out of that was that everyone wanted ONE contact point. Period. End of discussion. They don't want to look down a laundry list or menu of different things because terminology in the business world means one thing and its totally different. We just need one number to call and that's the bottom line

Mr. Poremba: I agree with that. Chairperson Bulach: good, don't say anything else. Mr. Poremba: I don't think we need to be discussing the design of that delivery system if we just need to be in agreement that we want employer services as part of the system.

Mr. Barbieri: From that point of view, what I would suggest is a way to define this point is, the recommendation is that employer services should be part of the workforce development delivery system, and we could make the further recommendation that in the next (and we'll put some time on it) we will devise the basic design for that to happen within the next sixty or ninety days. It makes sense to put some parameters around it so that we know it will come back. But in the meantime we could move forward. So, is that alright? We'll put a timeframe on it of say, ninety days? I'm just trying to make sure we have some way to make sure the discussion happens.

Mr. Poremba: Couldn't we put that on the responsibility of the One Stop Operator? Couldn't the WIB say, One Stop Operator we want you to design and develop employer services and report back to us? Why does this Committee have to take on the task of designing the system?

Mr. Barbieri: Point well taken. Let's add it to the responsibilities of the Operator. Mr. Allen: Could you give us some guidelines, however? Mr. Barbieri: Sure. Not only that, but I think it would be a good idea to have private sector involved in the design. Chairperson Bulach: Did we

clarify the part where we said that services would be offered *through* or *at* the full service Center?

Mr. Barbieri: We're saying right now, through the system, and then under that, as we list the responsibilities of the Operator we're going to add "recommend a design/delivery system for employer/business services."

Now, I think the next point is on page three – "the One Stop Operator operates the Mission Center and participates in the coordination of satellite activities within the system." Here the intention was to simply make it very clear, that on the one hand, the Operator is responsible for the full service Center at 3120 Mission, and NOT responsible for the service system and all these other satellites. On the other hand, it's important that there's coordination and a real flow between all of the different points in the system. The Board, going back to the very first point that we brought up, is responsible for the overall system which includes the full service One Stop and all the satellites, ensuring that the whole thing DOES work. The One Stop Operator will participate because they're interconnected. Okay. Let's move on.

Mr. Holland: I'm sorry, I have a problem with the redundancy... "Operator operates?" I don't know what that means. And secondly, the reality is that, whomever the Operator is, they are really the administrator of the Center. The Centers will be set up – right now, there is no singular payroll or fiscal control at the Center. That's what the WIB will eventually have to make a decision about how do you want that center managed. Manager is much better than Operator, because the Operator, more likely than not, will not be delivering services at the Center. It will be the One-Stop partners who have staff and personnel out there.

Mr. Barbieri: And again, that conversation will take place among the potential Consortium members, and how that agreement, the terminology and language, it would be good for the Board because in fact, in the Consortium, many of them are offering services. Again, the law leaves that definition very wide open – it's up to us to define it. So I would like to leave those issues for future discussion, that where those will be addressed. Mr. Poremba, what did you want to add?

Mr. Poremba: If we substitute 'manage' for 'operate' in defining the role, we imply that the Operator is the manager of the One Stop, and I don't think we've gotten to that point. I like using 'operator' because it's consistent with ? Mr. Barbieri: And I think for the time being we should go forward with that, but that this needs to be addressed in future discussions.

So let's look again at our "first cut" at defining the recommended roles and responsibilities of the One Stop Operator. First of all, "implements the services described in the Memoranda of Understanding between the partners and the WIB. All of the core services, the information and referrals, everything described in the agreements, will be implemented at 3120 by the Operator.

Ms. Profaca: I apologize, I've been out of the One Stop loop for some time... when we talk about an MOU, are we talking about an MOU between the Center and the partners? Mr. Barbieri: The law requires that there is an MOU between each partner and WIB, and in that it will describe all of the services that will be offered, at the full service Center. In addition to that, there will be an agreement between the Operator and the Board that defines its role and responsibility as the Operator. This list that you see here is a starting point. But the operator, in a sense is dependant upon what the individual MOU's are saying, which is why we start with that as the first point. The first thing is identifying what everyone is bringing to the table, then we understand how we are supposed to operate the Center. The second question, which will be

what's the funding necessary in order to implement all of this, given the description of the design of the system and the commitment of the partners.

Ms. Profaca: So when we talk about MOU here, we're talking specifically about the development of the MOU between the partners and the Board, distinct from the MOU between the partners and the One Stop; because some areas we are developing many MOU's with many different One Stops.

Mr. Holland: Let me just tell you - there is a big distinction between MOU and other kinds of agreement, and I think Mr. Barbieri has been very careful with this distinction. An MOU is not generally a financial agreement. Mr. Barbieri: As you can see, underneath the roles and responsibilities, the first bullet is saying, "the Operator will implement the services described in the MOU's between the partners and the Board. And that's the requirement of the law, you have to have those MOUS in place. Then, the second part which we haven't gotten into on any level yet, is the discussion of what that agreement will look like between the Operator and Board, we've simply said, there will be one. Now we'll see some of the issues that came up in that discussion. Is that clear then?

Here's something that's included in the notion of the responsibility of the Operator, "to insure core services are offered" -going back to, at a minimum, of how the law describes them – number two, "recommends policy changes to the Board," three, "is accountable to the Board for the terms of the Operator / Board agreement," number four, "is empowered to enforce the MOU's on behalf of the Board," the notion here is that, who ever the Operator is, there is some level of authority, and that level of authority is, in essence, as an agent of the Board. In order to insure that that full service Center is doing what it needs to do, in taking that MOU, it is what will tell us what needs to be provided.

The next item is, "provides recommendations for funding" and then the next item is, "manages the Center budget." I want to distinguish, the definition of "managing the Center budget" was specifically having to do with insuring that any funds that were allocated by the Board to the Operator for the operation of the Center, they would be deploying those resources. Obviously, we haven't gotten into any discussion beyond that- simply that, when you manage anything, you have to understand what resources you're putting out there and that translates into money.

Mr. Allen: My question is the accountability. I guess putting it in terms of what I've experienced. Talking about the agreement between the Operator and the Board...How extensive is the agreement? Is there any tracking system? Are there any checkpoints in that agreement? Because I've found that people out there, in working with them, they just pass people through the pipeline, and I don't want to see that.

Mr. Barbieri: Your point is very well taken, and there's been a lot of points raised about exactly what that accountability is. We have not gotten into that discussion here, because there is no current agreement and that would be a part of what still needs to be discussed.

Mr. Allen: That's going to be so important, because without that this whole thing is nothing. Mr. Barbieri: There are a lot of different opinions about the shape and the depth of that – in fact, I think that that's one of the next tasks that Susan and I will be trying to work on over the next month, we'll be defining that. All we're saying so far is, "here's what the system looks like, here's the parts. Now that we've defined what the system looks like, we understand that we have to establish the relationships, the accountability to all those parts

Mr. Allen: I just feel that as you draft this agreement, you make sure that it's trackable and that you have checkpoints. Meaningful checkpoints. Because otherwise it's just a waste of time.

Mr. Barbieri: Okay. Other points to bring up? Mr. Johnson: Just to make it known, it needs to be addressed at some point, that 3120 Mission is in the process of hiring a manager, and I think the relationship between the Operator and the 3120 management needs to be very explicit. It's not mentioned here. Mr. Buick: I think that would be part of managing the budget. Mr. Johnson: It's beyond that. The manager has more responsibility than that. I just think whatever we say about the Operator, there needs to be some recognition of the relationship between the Operator and the manager. Mr. Barbieri: Correct. Mr. Poremba: I don't think though, that this is this Committee's responsibility, to define that relationship. I think that will come out as we define the role of the Operator, and what the Operator agrees to. That's where the relationships will be explored

Mr. Barbieri: that makes sense, but I would add another sentence to it. One of the concerns, and it has to do with past history here, is the clarity of the governance authority and accountability of that system operating, who's responsible to who, who has the right authority and how that will occur. From that point of view, this committee should be interested in seeing that there is a clear governance/accountability structure, whatever that may be. At the same time, I agree with you John, that discussion could occur between the operating partners. I'll just put my cards on the table because I'm not playing in the game. To me, the same way that the Operator is an agent of the Board, the Center manager has to be an agent of the Operator. That's the only way it will actually work. Therefore, the Center Manager has to be accountable and responsible to the Operator. That doesn't mean for their annual performance review, let's be clear. In terms of the operation of the Center, they are the agent of the Operator, and the Operator in turn is the agent of the Board. Therefore, the accountability is very clear. This way we can point fingers. But we haven't had that discussion yet. So – probably the most challenging bullet found here is the responsibility of the Operator, because we say simplistically, "coordinate seamless service delivery." That is a huge bite, though it sounds very sweet like a good hors d'oeuvre. Ms. de Gallery-Beal: And it's all tied to the MOU's...the Operator will be looking at what's being committed, through the MOUs, and integrate the services.

Mr. Lugo: I have a comment, for clarification... are we talking about the Center? If so, that should be there. That it's the seamless service delivery at the Center. Mr. Barbieri: Well the previous sentence says, "the Operator operates the Center" therefore underneath that we have all of those things. I'd like to mention the last two, just to touch on some clarification there, and again, the partners that were present for that discussion could certainly clarify if I'm not stating this right. The last two bullets say "in collaboration with the Board, develops and maintains the systems' technology links." The notions of collaboration here was clearly that there has to be some integration. The issue of funding is an entirely separate matter, and I think when we get to that, you'll see that that's as much a total responsibility of the system as anything else. The same is true for, "implements marketing." Clearly, the Operator is going to be one of the chief 'agents' if you will of outreach. That doesn't mean it has to come up with a marketing campaign and put the money out. That's a local question too.

Mr. Barbieri: If we go to the next page, page four, and because of time I'm going to suggest how crisp we can do this, but by all means continue to ask questions. We got into the system costs as an overview. We wanted to identify what would be critical elements of the infrastructure that would be necessary to the support of operation of a One Stop Center. The general concern and background for this, by the partners and potential Consortium members, is that the burden of operating that One Stop Center and its infrastructure would fall completely on them, and that was untenable. I think we could say it that simply. Now, what does that mean if

there is no attempt to define where that threshold is? And that is, I think as Lynn said earlier, that will be very much at part of the discussion later on.

Right now, what we're simply doing is making some broad strokes that say, "the partners recommended that the Board seriously consider establishing some level of funding for the basic infrastructure and operations of the One Stop Center, and that the following elements were identified as critical elements of what that infrastructure is." And as you'll see, the list goes everywhere from equipment and tracking to supplies, security, utilities, telecommunications, web site, maintenance, furniture, MIS, capacity building, staff, signage and marketing. If you go down to the bottom of the page you'll see some overlap. The partners also identified the following costs as shared, meaning: the partners expected in their MOU's to be contributing to the costs in areas such as space, overhead allocation, service delivery staff and phones. I don't think that in either category it is 'limited to', but as a first cut of identifying elements that we would say are critical to infrastructure, that some level of funding would be necessary from the Board, and that certain other elements and funding that the partners would expect to be contributing to, as a starting point. Is that stated – I'm looking at the partners now – clearly, would you like to add anything to the description now?

Mr. Barbieri: Underneath that matrix, we touched on other costs assumed under the PIC, Inc, as administrative and grant recipient, such as procurement, accounting, and legal counsel, etc. Those are really administrative costs. Mr. Lugo: I would add 'equipment' to this lower list... Mr. Barbieri: I would to. That's a reasonable addition, and I'm looking around the table for comments. Mr. Buick: I'd recommend that we go back to the front page and revise it to read SOME level of funding, which better reflects what we're thinking. Mr. Barbieri: So we would say that partners recommend that the Board offers some level of funding to support the basic infrastructure. Page One, the third box, when it's brought forward as an action item at the next meeting, the recommendation from the Committee (we'll drop the word partners) is that the Board offer some level of funding to support the basic infrastructure costs of the One Stop Center. And then I think what we'll do underneath that is to have page four follow immediately.

Mr. King: Clarification... in the boxes you have a list of some specific cost items, some of which are also addressed as shared costs, but some are listed in both places, and some are not. Was that intentional? I'm wondering if we shouldn't have more discussion about what is clearly shared and what we are agreeing that the WIB is going to pay for, because some of the things that aren't listed as shared costs, I would think, the partners should contribute to. Mr. Barbieri: For example? Mr. King: Maintenance, tracking, well virtually everything that's on the list. Security, utilities.... Maybe I haven't been privy to some of the discussions that have arrived at how the shared or contributable costs were identified, but I'd like to hear more discussion of that. What's listed in the boxes here... that's a lot of costs.

Mr. Johnson: I think what led to that was wanting to look at funding it, up to this point – different levels, etc. – and that no one knows what the MOU's are going to look like yet, because they're not written. So I think that the box was created to cover everything that might not show up in the MOU's. So it was more general, these were all the areas that we feel need to be funded, a lot will be funded once the MOU's are written. We don't know what the MOU's are going to say yet, so it was more of an umbrella statement, saying these are the critical areas and some of them will be funded once the MOU's are written.

Mr. Barbieri: Yes, and I think what Craig is saying is that on the surface what it implies, but not being included on the second list, is that some of these would be only covered by the Board. That's the implication, when you look at how this is formatted right now. Mr. Lugo: One

suggestion is to word it in a way where you describe the universe of need and say that some of those are needs to be shared, or are going to be shared by the Operator, such as _____, and that way it leaves it open. Then in further discussions when you get down to who's able to put what on the table, you can identify it exactly. You know, I don't see "paper clips" here... Mr. Barbieri: If you go to the top of the page, it says, "the partners recommend that the Board seriously consider establishing some level of funding for the basic infrastructure." And the next sentence says here some of those elements... If you just look at it from that point of view, all of these items could be included. If security costs \$20,000, then that could be a 'system' and not just a 'Center' issue. I think the only reason that it gets a little bit confusing is that because we have the other list down below, which in contrast seems to limit. I would almost suggest, because we know that a lot of these things are going to be addressed in the MOU's, that we might just leave the top portion, remove the bottom portion, understanding that the MOU's are going to be addressing all of the shared costs and contributions by the partners. That leaves a lot of room, and we haven't gotten to the cost analysis, etc. that really needs to be done in order to put this some sort of frame of reference. We really don't know what we're talking about yet.

Mr. Poremba: Craig, I think the key is that when we came up with the list, we were not looking to identify who was going to fund it. What we were doing was identifying critical elements that needed to be supported, either through agreement in the MOU's, and if not through agreement, then some other source of funding had to fill that gap. Practical example aside... everybody will put up a sign that has their name on it. But who pays for a sign that has the umbrella organization's name on it. Is it the responsibility of one of the partners to do that? All of the partners? Or the system to do it? Those things need to be worked out, and if they're not worked out, then there's a hole and someone has to determine how it is filled. What we were trying to identify is the potential holes. Mr. Barbieri: I'd forgotten that that really was the context of the discussion, to say, "Where are the holes?", which is exactly what John's describing. Beyond the list of the critical elements, let's see what the MOU's are, let's see what's missing, where are the gaps, and then we have the discussion about how to fill those gaps. There is no assumption that it is solely the Board's responsibility to fill those gaps.

Mr. King: I'd rather see a statement at the bottom of the page that indicates that the partners will contribute to the critical element costs while operating the Centers, to the maximum extent possible. Mr. Barbieri: Well I think, again, that discussion we're getting into funding and there's a difference between "some level of funding" and saying "to the maximum extent possible" ... I would not try to create that kind of a boundary line right now, I think that that's about funding, and that's getting more into the definition of what's going to get funded and how. When you start saying maximum or minimum, you're putting parameters that are broader than perhaps this Committee wants to put out. Mr. King: Well, do we have a consensus to eliminate that section at the bottom of the page.

Mr. Lugo: My suggestion is to add whatever items from the bottom that you don't have to the top, be included to the top, to add to that universe of items. Mr. Barbieri: I would suggest that we put one sentence at the bottom that says, "the partners will identify through their MOU's what degree of funding they will supply toward the identified critical elements. That leaves it fairly wide open. Ms. Profaca: If the MOU's are not financial contracts, they can't have any of that language in it. Mr. Barbieri: We could get into a long discussion, but what the actually says is that you shall have shared resources explicit in your MOU's. What the general tact has been, mostly because of State agencies, is that they are attached as an agreement, as opposed to a financial agreement. But clearly what the partners need to do is to describe and define what their contribution to the overall costs needed to operate the system and/or center, and that will part of the MOU process.

Mr. Holland: The Federal language does clash with the State language. If I could make an observation here...we've been running the center with a multiplicity of agencies for the last three, four years, and I'm sort of surprised, looking at the discussions we've had, at what doesn't emerge. The one thing that's emerged most frequently is the problem that Tony mentioned earlier – and that's consumable supplies. We can always take care of the rest, the equipment, the furniture, somehow, somehow, it gets done by one or more of the partners – what doesn't is consumable supplies, continuously. Toner, pencils, things of that sort. The other observation to it is despite the frequency of that complaint, it somehow gets done. My suspicion is that what we have is a bunch of supply sergeants from participating organizations that somehow get it done, and we complain bitterly about the way it's done. So that's something that we need to develop a process for. How do you ensure the consumable supplies? I don't think one partners going to buy stationary for another partner with different letterheads.

Mr. Barbieri: Would anyone disagree with what we've come up with so far? I'm trying to move us on, and I think we're in agreement, actually. Would anyone disagree that we are going to leave the top portion of this page together, and have a statement on the bottom that basically says, "the partners shall identify through their contributions to the costs of operating the Center at 3120 and to these critical elements of the infrastructure," and identify what their contributions will be through the MOU's between themselves and the Board. That leaves the negotiations wide open, to include everything, as it doesn't exclude anything. Let me just mention that under the bullet that says furniture, it says "access to intensive services," that was a point of concern about what would be provided at 3120, and that we simply fold that into the notion that that will part of the review of our compliance, and that will be addressed at that time. Underneath that is simply the definition by law, I think we can move on. Two-thirds down the page, to the underlined One Stop Consortium. For those who are unfamiliar, there are three ways that quote a One Stop Operator can be designated. One of them says you can put it out to competitive bid. The next says it can be a consortium of three or more partners. The third one talks about grandfathering in a pre-existing entity. The recommendation from the partners, to be put on your action item list for your next meeting, would be that it would be the consortium model of three or more of the partners as the Operator. The bullet below that statement identifies to-date who the potential consortium members are. There are five identified. Department of Human Services; Employment Development Department; National Council on the Aging; the Private Industry Council, Inc. and City College of San Francisco. For your information, we have had one meeting with those five entities to begin discussing that, and needless to say, more discussions have to occur. Also -

Mr. Holland: Could I make a suggestion here? There is a tendency to talk about the partners without talking about what the [unintelligible] is. The Department of Human Services is a department of the City and County of San Francisco. The Employment Development Department is a department of the State of California. I think it's important for purposes of what's being discussed that that be clarified. I would also identify who the designated authorities are. It's the WIB in consultation with the Mayor. Mr. Barbieri: I think whatever the appropriate language was, whatever's necessary, will be included. If we don't, I feel quite confident that legal counsel will catch us. I'd also like to include in that language, because I think it's a healthy reminder, that this model shall be a starting point, and again the attempt here is to say this is may or not be long-term vision, but where shall we start. We'll start with the consortium model, let's see how that goes.

Mr. Holland: Talk about starting points, we've had this starting point for about three years, we're not just starting out. There's an issue of capacity to contract. Consortium don't have, in of

themselves, the authority to enter into a contract, or even MOU's. We need to think about that. Mr. Barbieri: And again, I think those things will be made clearer. Now on page six, to the last section called Structure, surprise that the concerns expressed by the potential consortium members is will there be resources. Who's funding what? What are they being asked to put out on the table? And what they are being asked, does that hinder their capability and ability to provide what they're being required to provide underneath their funding source? I think in terms of this Committee today, the recommendation on structure that's necessary is that the Board enter into an agreement with the Operator for the operation of the Center at 3120 Mission Street. The last bullet is really a point of clarification. The administrator of the funds from the Workforce Investment Act is clearly the responsibility of the PIC, Inc., in partnership with the Mayor. That's just clarifying that the Operators don't really have any control over the funding issues, which was raised previously.

Mr. Poremba: On page five, access to intensive and training services. It identifies that it's an issue, but there's nothing else there. My question is, is this an issue that's been identified for this Committee to discuss? Mr. Barbieri: If you look at the regulations, that One Stop centers will make intensive services available to adults and dislocated workers, and that training will be also be made available. I think it does need to be discussed in terms of compliance with the law, and how that will actually happen at 3120 Mission is not clear right now, just that it will happen.

Mr. King: I think if we were to examine the services that are being provided by the Access Points we would find that there's a lot of intensive services and training services that are being carried out. I wouldn't agree that we're so severely not in compliance with WIA, it's more an issue of coordination and monitoring and tracking... coordination of referrals, from the One Stop Center in some kind of system of case management that can monitor and track the services that are being delivered. Mr. Barbieri: I think that that's an issue that needs to be discussed. Mr. Poremba: Does that belong with this committee? Mr. Barbieri: I would say, yes it does, and it should be addressed at the next meeting. That there should be a recommendation that has to do with the accessibility of intensive and training services to be a full service One Stop.

Mr. Holland: Do you mean Center or System? Mr. Barbieri: Right now we're saying Center. For instance right now, unless our understanding was wrong, you cannot walk into 3120 and be determined eligible. That means that we are not in compliance. That needs to be addressed. That does not preclude or in any way exclude what is occurring at Access Points whatsoever. So it's saying, what would be better also to be available at the Center, for a person to come in and be declared eligible to move on to the system, rather than saying now you've said hello to us, please go over there because we can't handle you, even though this is a full service One Stop Center. That's the issue, not the Access Points.

Mr. Poremba: So what kind of information does this Committee need to discuss this issue? Do we need to know how it currently is operating? Do we need a summary statement that says this is the way the system currently works? I'm trying to grapple with how do we then address this issue? Mr. Buick: I think it would come from a gap analysis discussion. We would have some levels in some areas, and not much on others. Mr. Barbieri: It is a system design issue. Mr. Holland: Are we talking about what does work, or what doesn't work? Mr. Lugo: One of the challenges is that the WIA funding is a minute part of the entire system. In most other areas, the entire WIA funding goes through the Centers, and that's how clients are served. In San Francisco, it's very different. Probably 90% of the funding and the resources that are going to be provided to clients are probably going to be non-WIA, through the system. That makes it challenging to figure out.

Chairperson Bulach: We have to wrap up our discussion.

Public Testimony

Chairperson Bulach asked if anyone had any public testimony on agenda items. None was offered.

Next Meeting

The next meeting scheduled will be May 25, 2001 from 8:00 – 10:00, location to be announced.

The meeting was adjourned at 9:50 a.m.

Minutes prepared and submitted for approval by Ms. DeCristofaro on May 18, 2001

Workforce Investment San Francisco

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING

OF THE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD ONE STOP COMMITTEE

Date: Friday, May 25, 2001
Time: 8:00 – 10:00 a.m.
Location: Career Link Center - Mission
3120 Mission Street
San Francisco, CA 94103

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City Hall, Room 244
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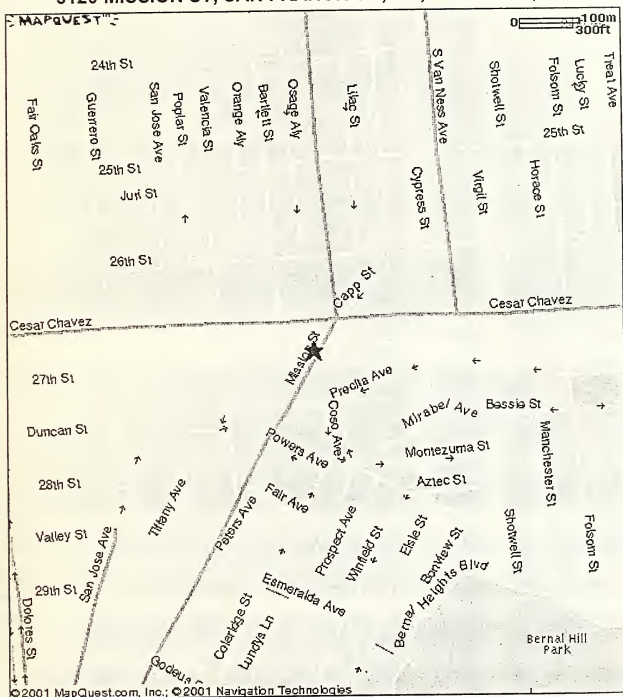
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Issued: Friday, May 21, 2001

PROPOSED AGENDA

1. Welcome and Introductions (*Action Item*)
2. Adoption of the Agenda (*Action Item*)
3. Approval of the Minutes (*Action Item*)
4. Public Testimony on Agenda Items (*Discussion Item*)
5. Overview of local Workforce Development System (*Discussion Item*)
6. Recommendations for the design of the organizational and management structure of the One Stop workforce delivery system (*Action Item*)
(see attached materials)
7. Recommendations for the Workforce Investment Act strategic budget (*Action Item*)
(see attached materials)
8. Public Testimony on Non-Agenda Items (*Discussion Item*)
9. Future Agenda Items (*Discussion Item*)
10. Adjournment (*Action Item*)

3120 MISSION ST, SAN FRANCISCO, CA, 94110-4504, US



Here is a map indicating (with the star) the exact location of the Career Link Center at 3210 Mission Street. You may park in the parking lot located across from the Center, on the opposite side of Mission Street. The entrance to the lot is located right next to the building located at 3119 Mission Street.



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MEMORANDUM

TO: ONE STOP COMMITTEE OF THE
WORKFORCE INVESTMENT BOARD
MAYOR'S STAFF

DATE: MAY 22, 2001

FROM: PAMELA S. CALLOWAY, PRESIDENT

RSC OH PSC

SUBJECT: PY'2001 WORKFORCE INVESTMENT ACT (WIA) ALLOCATIONS AND
PROPOSED STRATEGIC BUDGET TO SUPPORT PROGRAM
ADMINISTRATION, THE ONE STOP SYSTEM, AND TRAINING
SUBCONTRACTS FOR INDIVIDUALS WITH MULTIPLE BARRIERS TO
EMPLOYMENT (ACTION ITEM - AGENDA ITEM 7)

The One Stop Committee is being asked to review staff's proposed strategic distribution of Workforce Investment Act (WIA) formula allocations for Program Year (PY) 2001 beginning July 1, 2001.

WIA allocations for San Francisco were finally released by the State on May 17, and because of the late announcement, strategic decisions about the use of these funds need to be made very quickly:

	<u>Adult</u>	<u>Dislocated Worker</u>	<u>Youth</u>	<u>Total</u>
PY'2000 (current year)	2,102,809	2,369,840	1,471,903	5,944,552
PY'2001 (upcoming year)	<u>1,908,004</u>	<u>1,952,323</u>	<u>1,807,547</u>	<u>5,667,874</u>
Differences	-194,805	-417,517	335,644	-276,678

BACKGROUND

The One Stop Committee and the Program Investment Committee share responsibility for budgeting the WIA Adult and Dislocated Worker funds.

This Committee's task is to develop a *strategic* budget, dividing each WIA funding stream into percentage shares for *administration*, for *One Stop system building and support*, and for *training*. Your recommendations will move to the Executive Committee and Workforce Investment San Francisco (the Board) for action.

Providing your strategic division of WIA resources is accepted, the following activities then occur:

- *Adult allocation:* The Program Investment Committee distributes the *training* dollars to effective community-based subcontracts to serve low income San Franciscans with multiple barriers to employment;
- *Dislocated Worker allocation:* The PIC, Inc. staff distributes the *training* dollars by completing individual assessments of the skills and interests of laid off workers and developing personalized *Individual Referral* (IR) training subcontracts with agencies listed on the State-certified Eligible Training Providers List. This case-managed system operates much like a voucher system for dislocated workers; and
- *Youth allocation:* The Youth Council distributes the *training* dollars in a fashion similar to the Program Investment Committee's action for Adults above but with a youth focus and a minimum requirement for expenditures on those who are out-of-school.

DEFINING THE WIA STRATEGIC BUDGET CATEGORIES

WIA's three formula-based funding streams provided \$5.94 million to the City and County of San Francisco in the current Program Year (July 1, 2000 – June 30, 2001). For each of the three funds, a strategic budget was adopted in May of 2000 which provided for —

- 10% of each allocation to be reserved for the administrative expenses of the system, as provided by the Act and its Interim Final Rule;
- 15% of each allocation to be reserved for the One Stop system support; and
- 75% of each allocation to be reserved for the training of individuals targeted by the intent of the Act (for Adult and Youth funds, training for low income San Franciscans, and for Dislocated Workers, training for workers laid off from jobs in San Francisco).

In August of 2000, the classifications of all costs under the WIA were redefined significantly; please refer to the "Final Rules and Regulations" for the WIA at 20 CFR §667.220.

"One Stop system support" is a share of the resources designated to build and support San Francisco's One Stop Workforce Development System. Please refer to Attachment One for an estimate of the current year's activities and expense.

"Training" services are one of the three essential services provided in the system. These subcontracts are negotiated and monitored —

- with competitively-procured subcontractors under the Adult Program,
- with competitively-procured subcontractors under the Youth Program, and
- with vendors selected from the Eligible Training Provider List under the Dislocated Worker Program.

PY'2001 WIA STRATEGIC BUDGET

The actual PY'2000 (current year) strategic budget is as follows:

Actual PY'2000 WIA Budgets		Adult Programs	Youth Programs	DWP Programs	Total All Programs
Revenue: PY'2000 Allocations		2,102,809	1,471,903	2,369,840	5,944,552
Expense: PIC Administration	10%	210,281	147,190	236,984	594,455
One Stop Building & Support	15%	315,421	220,785	355,476	891,682
Training (Subk. & Support Pools)	75%	1,577,107	1,103,927	1,777,380	4,458,414
	100%	2,102,809	1,471,902	2,369,840	5,944,551

For the sake of discussion, staff is presenting below alternate "system building" scenarios for the upcoming PY'2001, based on the reduced allocations:

- Scenario #1** reserves 10% of the new WIA funds for administrative expense, and of the balance, directs 15% to build and support of the One Stop system and its infrastructure development, and directs the remaining 75% to training programs and a supportive service pool for child care, transportation, etc. (This is the same strategic distribution as the current year.)
- Scenario #2** reserves 10% for Admin and directs 25% of the allocation to One Stop System Support and 65% percent to training and supportive services.
- Scenario #3** reserves 10% for Admin and directs 35% of the allocation to One Stop System Support and 55% to training and supportive services.

PY'2001 Scenario #1		Adult Programs	Youth Programs	DWP Programs	All Programs
Revenue: Allocations PY'2001		1,908,004	1,807,547	1,952,323	5,667,874
Expense: Administration	10%	190,800	180,755	195,232	566,787
One Stop Building & Support	15%	286,201	271,132	292,848	850,181
Training (Subk. & Support Pools)	75%	1,431,003	1,355,660	1,464,242	4,250,905
	100%	1,908,004	1,807,547	1,952,322	5,667,873

PY'2001 Scenario #2		Adult Programs	Youth Programs	DWP Programs	All Programs
Revenue: Allocations PY'2001		1,908,004	1,807,547	1,952,323	5,667,874
Expense: Administration	10%	190,800	180,755	195,232	566,787
One Stop Building & Support	25%	477,001	451,887	488,081	1,416,969
Training (Subk. & Support Pools)	65%	1,240,203	1,174,906	1,269,010	3,684,119
	100%	1,908,004	1,807,548	1,952,323	5,667,875

PY'2001 Scenario #3		Adult Programs	Youth Programs	DWP Programs	All Programs
Revenue: Allocations PY'2001		1,908,004	1,807,547	1,952,323	5,667,874
Expense: Administration	10%	190,800	180,755	195,232	566,787
One Stop Building & Support	35%	667,801	632,641	683,313	1,983,755
Training (Subk. & Support Pools)	55%	1,049,402	994,151	1,073,778	3,117,331
	100%	1,908,003	1,807,547	1,952,323	5,667,873

Under these scenarios, the impact on number of participants trained over the course of the year (assuming *across-the-board* reductions) would be, in the Adult Program, a drop from the current year's 313 to 284, 247 and 210 respectively.

RECOMMENDATION

Staff recommends that the current strategic distribution of 10% admin - 15% system building & support - 75% training be maintained for the upcoming program year (Scenario #1).

San Francisco's *Strategic Five-Year Local Plan* contains no specific guidance for the budgeting of allocations — it was written long before first-year allocations were known — but it does contain the following statements:

"WIA funds will be prioritized through training contracts with CBOs and other vendors or providers to prepare persons with multiple employment barriers for entry level jobs with advancement potential." (pp. 14).

"San Francisco will also secure Intensive and Training services using ITAs and competitively-procured contracts with agencies uniquely qualified to serve individuals with multiple barriers to employment (for example, case management for welfare recipients or short-term job readiness for the long-term unemployed)." (pp. 14).

"Individuals who, at the point of initial assessment, present multiple barriers to employment or are identified as strong candidates for Training Services will be moved directly into specialized assessment and linked with appropriate training services. It is our intention to have the transition from Core, to Intensive, to Training Services be immediate from the perspective of the client. (We do not want to have the client experience a failure-based system.)" (pp. 20).

While WIA funds constitute a small part of the city's workforce development system, it is an important part: WIA is one of the few programs providing quality training to low income residents with multiple-barriers to employment.

Increasing the amounts set aside for system building and support, at the expense of training services (one of, if not the most important, services in the system), would be contrary to the expressed intent of the current Plan. Modifications to the Plan are appropriately considered by this and other Committees. A modified *San Francisco Strategic Five-Year Workforce Investment Plan* would guide funding recommendations, strategies, and decisions in the future.

Staff will be available at the meeting of the One Stop Committee on May 25th to discuss these issues and attempt to answer any questions you may have.

cc: JDB & Associates
One Stop Partners
PIC Staff

Attachment A —

System building and support funds were set aside in the current year and they constituted 15% of each of the three allocations. Shown below are system building services along with the estimated amounts of funds expended through March 31st:

SYSTEM ADMINISTRATION DUTIES (9-month period ending March 31, 2001)	PY'00 Est. Expense
general coordination of the One Stop system, with reliance on existing management committees and operations workgroups created by and among the partners	152,083
assistance with access point development and their Internet presence	6,000
initial acceptance and verification of Eligible Training Provider List applications for training services	47,000
dissemination of State-certified ETPL information to all One Stop partners	78,000
coordination of data collection for customer satisfaction, including analysis and reporting	Paid with YOG Funds
coordination of labor market information survey data collection, analysis, and dissemination, including gap and sector analyses performed with the help of business and organized labor volunteers	Paid with LMI Funds
grant management, procurement (solicitation of goods and services), and accounting for all WIA funds	59,500
program planning, budgeting, and funding recommendation, research and development of new resources for the San Francisco job training system	112,500
development of uniform applications for services and protection of confidentiality	18,000
long-term follow-up data collection, summarization, and reporting	3,000
coordination and integration of funding streams and resource leveraging	15,000
contract administration, ADA compliance monitoring, service deliverer communications and information dissemination	257,450
municipal government relations and coordination with department initiatives	12,000
tax credit assistance and Enterprise Community/Zone benefit information for employers or other business customers	Paid with MOCD Funds
coordination of rapid response assistance activities for dislocated workers, including formation of labor-management committees, regional response teams, or base-closure economic development groups	45,000
centralized Internet service provision, electronic system development, and continuous update of website content	Paid with YOG Funds
resolution of audit and monitoring findings, preparation and implementation of corrective action plans in response to findings, and clarification of legal issues	12,500
eMae connection of DBMS systems, participant data management, grant reporting and locally-driven evaluation for all WIA-funded One Stop activities	137,300
collection of "community specialist" information (resource mapping) to provide "wrap-around" connection services for special groups	Paid with YOG Funds

centralized marketing and public relations, including focused outreach to selected communities and client groups	0
other workforce development duties as may arise in response to economic change over the next five years	7,000

ESTIMATED SUBTOTAL = 962,333

ONE STOP OPERATOR DUTIES

(9-month period ending March 31, 2001)

coordination of One Stop personnel development, staff training, system building and continuous improvement	156,747
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ESTIMATED SUBTOTAL = 156,747

ESTIMATED TOTAL (Quarter 3 period ending March 31, 2001) = \$
1,119,080



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MEMORANDUM

TO: ONE STOP COMMITTEE OF THE
WORKFORCE INVESTMENT BOARD
MAYOR'S STAFF

DATE: MAY 22, 2001

FROM: PAMELA S. CALLOWAY, PRESIDENT

RRH D & PSC

SUBJECT: RECOMMENDED DESIGNS OF THE ONE STOP DELIVERY SYSTEM AND
THE FULL-SERVICE ONE STOP CENTER
(MAY 25th COMMITTEE MEETING – AGENDA ITEM 6)

As the planning committee for the local One Stop workforce delivery system, the One Stop Committee will take action at the upcoming meeting on the recommendations below, concerning the design of the organizational and management structure of the One Stop system in San Francisco.

Background

Funded by a grant from the San Francisco Foundation, the management consulting firm of JDB & Associates has recently been contracted by the Private Industry Council, Inc. to facilitate the process of formalizing the design of our local One Stop system. JDB & Associates has an excellent reputation for successfully facilitating this process for many One Stop systems throughout the State. Their expert assistance has helped us to begin defining each of the partner roles, responsibilities, and level of support for the One Stop system in San Francisco.

For the past several months, JDB & Associates has been working with many levels of the One Stop partner organizations in clarifying the details of the delivery system and formalizing an effective governance structure for San Francisco. They have met with One Stop partners as a group and have also conducted in-depth one-on-one interviews with partner representatives. JDB & Associates has visited all the One Stop Centers in San Francisco, as well as several community-based organizations participating in the One Stop network. Through several working meetings with the mandatory One Stop partners, JDB & Associates has assisted the partnership in working towards collectively coming to an understanding on how the One Stop system can be supported by the available resources, in order to provide quality services to all customers, individuals and businesses alike. In doing this, JDB & Associates will also assist us with submitting more fully developed MOUs (Memoranda of Understanding) to the State.

At the May 3, 2001 meeting of the One Stop Committee of the Workforce Investment San Francisco Board, the Committee reviewed and discussed the proposed recommendations presented by JDB & Associates on behalf of the One Stop partners. In doing so, Mr. Barbieri emphasized that these recommendations created a starting point for the design and development of the WIA workforce delivery system. They are not the final vision of the system and means of operations but a place to begin, and that the WIB should consider reviewing this within two years.

Recommendations

- It is recommended that there be one full service center as described by law and regulation and that center shall currently be located at 3120 Mission Street.
- It is recommended that the role of the "full service" Center is to provide at a minimum the core services described in the WIA (Section 662.240 of the Final Regulations).
- It is recommended that intensive services also be available through the full service center (Section 663.100 of the Final regulations), and that training services be accessible.
- It is recommended that there be two levels of access to the One-Stop System: full service center and satellites. The role of a satellite is to provide universal access to information about services available through the One-Stop system and referrals to the system. Where available, satellites could also provide access to some services.

Definition: A satellite is a site that offers something less than full service as defined by Workforce Investment Act. Currently this would include two other existing career centers and all of the community-based organizations that serve as Access Points.

- It is recommended that the local definition of the "Operator" is that entity which operates the 3120 Mission Street Center and participates in the coordination of satellite activities within the system.
- It is recommended that the role and responsibility of the "Operator" include the following:
 - Implements services described in the MOUs between the partners and the LWIB
 - ☐ Ensures core services are offered as defined by the law
 - ☐ Recommends policy changes to the LWIB
 - ☐ Is accountable to the LWIB for terms of the Operator/LWIB "agreement"
 - ☐ Is empowered to enforce the MOUs on behalf of the LWIB
 - ☐ Provides recommendations for funding
 - ☐ Manages the Center budget
 - Convenes the One-Stop partners to improve the service delivery
 - Coordinates seamless service delivery
 - In collaboration with the LWIB, develops and maintains the system's technology links
 - Implements marketing
 - Recommends a design/delivery system for employer/business services. This will include input from the business community and clarification about how such services will be accessed.

- It is recommended that a "Consortium" model be adopted as Operator.

Currently, the Department of Human Services (DHS), Employment Development Department (EDD), National Council on Aging (NCOA), the Private Industry Council, Inc. (PIC), and City College of San Francisco (CCSF) are considering the respective agency roles and responsibilities as a potential partner of the recommended One-Stop Operator consortium.

- It is recommended that the Workforce Investment San Francisco Board consider establishing a baseline level of funding for the development of the infrastructure and for the operation of the system, as well as for the full service center.

Additional information

The Committee also reviewed a listing of critical infrastructure elements that are necessary to support for the operation of the full service center. They also reviewed a list of potential "shared" costs which partners could identify in their MOUs. There is currently no recommendation that specifies which elements should be funded entirely or partially either by the Board or by the Partners.

At the May 3rd meeting, it was also clarified that there would be two types of agreements:

- The MOU between the WIB and each of the Mandatory Partners as described by the Workforce Investment Act. A Resource Sharing Agreement will be attached to these MOUs describing the cost sharing for support of the system.
- An agreement between the Operator and the Workforce Investment San Francisco Board, describing the roles, responsibilities and accountability of the Operator in relation to the Board.

Two points that were discussed at the May 3rd meeting warrant mention:

- The importance of having clearly defined accountability of the Operator.
- The relationship of the "Center Manager" to the Operator. It was suggested that such a relationship be part of the discussion between the potential Consortium members.

Staff will be available at the meeting of the One Stop Committee on May 25th to answer any questions you may have.

cc: JDB & Associates
One Stop Partners
PIC Staff

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING

OF THE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD ONE STOP COMMITTEE

Date: Friday, July 27, 2001
Time: 8:30 – 10:30 a.m.
Location: City College of San Francisco
Auditorium
33 Gough Street
San Francisco, CA 94103

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Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
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OTHER ACCOMMODATIONS

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Issued: Friday, July 20, 2001

PROPOSED AGENDA

1. Welcome and Introductions
2. Adoption of the Agenda (*Action Item*)
3. Approval of the Minutes for May 25, 2001 (*Action Item*)
4. Public Testimony on Agenda Items (*Discussion Item*)
5. Introduction to the Eligible Training Provider List (ETPL) (*Discussion Item*)
6. Presentation – One Stop San Francisco (*Discussion Item*)
7. Chair's Report
8. Public Testimony on Non-Agenda Items (*Discussion Item*)
9. Future Agenda Items (*Discussion Item*)
10. Adjournment (*Action Item*)

Community Event



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***You're invited to attend a presentation
about the local One Stop system --***

at the next meeting of the
**ONE STOP COMMITTEE OF
WORKFORCE INVESTMENT SAN FRANCISCO**

DATE: Friday, July 27, 2001

TIME: 8:30 – 10:30 a.m.

**LOCATION: City College of S.F.
33 Gough Street**

EVERYONE IS WELCOME!

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For more information, contact
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Workforce Investment San Francisco

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: ONE STOP COMMITTEE OF THE
WORKFORCE INVESTMENT BOARD

DATE: JULY 20, 2001

DOCUMENTS DEPT.

FROM: PAMELA S. CALLOWAY, PRESIDENT

P. Calloway

JUL 23 2001

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SUBJECT: INTRODUCTION TO THE ELIGIBLE TRAINING PROVIDER LIST

As the planning committee for the local workforce delivery system, the One Stop Committee of the Workforce Investment San Francisco Board is responsible for initiating the discussion about the development of local policy for the Eligible Training Provider List (ETPL).

BACKGROUND

There are many issues associated with designing and operating an Eligible Training Provider system. This is a brief overview of regulations governing the development of such a system. From a local perspective, the active involvement of business and labor is critical to understanding what skills are in demand, what jobs are available, what career fields are expanding, and what types of training programs will best meet local employer needs.

The underlying principle of the provision of training services under the WIA is customer choice. One Stop centers will provide access to consumer information relating to training providers that can assist individuals in gaining relevant skills - including information about the performance of such providers in placing graduates in employment. Through local boards, each state will compile a list of eligible training providers that meet performance levels as set by the Governor and by local boards. Individuals may choose any provider from the list of approved providers, whether or not the provider is located in the local area where the individual resides.

The Workforce Investment Act creates a market-based system for training service and will provide a "level playing field" for a wide array of providers - large and small, public and private. Those who provide training services under the Act will have to meet the test private businesses face every day. They will have to deliver value to their customers, or risk losing them. With individuals making their choices based on past performance, ineffective training providers will not survive.

KEY ELEMENTS OF THE ETPL SYSTEM

- WIA establishes requirements that a provider must meet in order to be eligible to receive adult or dislocated worker funds and to be identified on a state list.
- There are two types of eligibility: initial and subsequent eligibility. Initial eligibility can last 12 to 18 months, depending on the methodology adopted by the State.

- The local Board receives all initial applications, reviews, and approves (or disapproves) them and then forwards the list of eligible providers and programs to the State. The State then compiles the lists from all the local areas and widely disseminates the list, making sure it is available through the One Stop system.
- To remain subsequently eligible, after initial eligibility is over, the provider must annually submit verifiable program-specific information to the local Board and be found by the local Board to meet the local performance criteria for each program.
- States set the general procedures and standards for performance, but locals can set higher standards. Both the State and local standards must take into account a variety of factors, including economic conditions and student or client characteristics.
- Performance information for eligible programs and providers in a manner consistent with requirements under WIA's overall accountability system.
- Cost and performance information must be provided on the eligible training providers list. The list should provide all the information needed for an adult or dislocated worker to fully understand the options available in choosing a training program.
- The list of providers and their eligible programs must be made available to the general public as part of the core services in the One Stop system.
- The state or local level may require providers to submit additional program specific information. If such requests impose extraordinary costs, the State or local Board must provide access to cost effective methods of collecting the information or provide additional resources to collect it.
- Programs and providers can be removed from the eligible list for several reasons: failure to meet local standards (determined either by the local area or during the data verification process by the state agency), intentionally submitting inaccurate information, or other violations of WIA requirements. States must establish provider appeals procedures for a denial of eligibility.

Attached please find the ETPL Glossary of Terms, WIA excerpts pertaining to the ETPL, and a copy of our local ETPL Application Packet. Staff will be available at the next meeting of the One Stop Committee to answer any questions you may have.

Eligible Training Provider Glossary

This section provides a glossary of key terms that relate to Eligible Training Provider programs and services. The glossary is organized alphabetically.

Consumer Report

A Consumer Report consists of key information on the performance outcomes of all training and education providers in the Eligible Training Provider system.

Customer

The customer is defined primarily as a program participant who is eligible to receive training services. Training vendors, employers, and staff are also considered valued “customers” of the Eligible Training Provider system.

Core Services

Core services are services that One-Stop Career Centers are responsible for providing for all adults and dislocated workers under WIA. The WIA mandates that there be universal access to core services.

Eligible Training Provider

An eligible training provider is an organization, entity or institution, such as a public or private college and university, community-based organization, or proprietary school whose application has been approved by the local workforce board and submitted to the state for inclusion on the state list of to provide training services.

Eligible Training Provider List

An eligible training provider list is a statewide compilation of providers that are approved to provide services through the One-Stop system. These lists contain consumer information, including cost and performance information for each of the providers, so that participants can make informed choices.

Eligible Training Provider Approval Selection

Eligible Training Provider Approval Selection is the method for approving training providers’ programs to be initially eligible and to be subsequently eligible (for all programs) using criteria such as completion rates, placement rates, earnings or wages, and other performance indicators, as determined by the state.

Individual Employment Plan

The individual employment plan is an ongoing strategy jointly developed by the participant and the case manager that identifies the participant’s employment goals, the appropriate achievement objectives, and the appropriate combination of services for the participant to achieve the employment goals.

Intensive Services

Intensive services are services that local Boards are responsible for providing for adults and dislocated workers under WIA. Intensive services may include specialized assessments of individual skill levels and service needs, individual or group counseling and career planning, development of an individual employment plan, short-term job-readiness activities, literacy activities related to basic workforce readiness, and paid or unpaid work experience.

Training Services

Training services is a special category of services that local Boards are responsible for providing to adults and dislocated workers under WIA. Training services may include occupational skills training, on-the-job training, job-readiness training, adult education and literacy activities, cooperative education programs, training programs operated by the private sector, skill upgrading and retraining, entrepreneurial training, and customized training conducted by an employer.

Universal Services

Universal services are services available to every individual through the One-Stop system including information about job vacancies, career options, relevant employment trends, job search techniques, resume writing, and access to the information gathered on training institutions in the area through the eligible training provider process.

Subpart E--Eligible Training Providers

Sec. 663.500 What is the purpose of this subpart?

The workforce investment system established under WIA emphasizes informed customer choice, system performance, and continuous improvement. The eligible provider process is part of the strategy for achieving these goals. Local Boards, in partnership with the State, identify training providers and programs whose performance qualifies them to receive WIA funds to train adults and dislocated workers. In order to maximize customer choice and assure that all significant population groups are served, States and local areas should administer the eligible provider process in a manner to assure that significant numbers of competent providers, offering a wide variety of training programs and occupational choices, are available to customers. After receiving core and intensive services and in consultation with case managers, eligible participants who need training use the list of these eligible providers to make an informed choice. The ability of providers to successfully perform, the procedures, State and Local Boards use to establish eligibility, and the degree to which information, including performance information, on those providers is made available to customers eligible for training services, are key factors affecting the successful implementation of the Statewide workforce investment system. This subpart describes the process for determining eligible training providers.

Sec. 663.505 What are eligible providers of training services?

- (a) Eligible providers of training services are described in WIA section 122. They are those entities eligible to receive WIA title I-B funds to provide training services to eligible adult and dislocated worker customers.
- (b) In order to provide training services under WIA title I-B, a provider must meet the requirements of this subpart and WIA section 122.
- (1) These requirements apply to the use of WIA title I adult and dislocated worker funds to provide training:
 - (i) To individuals using ITA's to access training through the eligible provider list; and
 - (ii) To individuals for training provided through the exceptions to ITA's described in Sec. 663.430 (a)(2) and (a)(3).
- (2) These requirements apply to all organizations providing training to adult and dislocated workers, including:
 - (i) Postsecondary educational institutions providing a program described in WIA section 122(a)(2)(A)(ii);
 - (ii) Entities that carry out programs under the National Apprenticeship Act (29 U.S.C. 50 et seq.);
 - (iii) Other public or private providers of a program of training services described in WIA section 122(a)(2)(C);
 - (iv) Local Boards, if they meet the conditions of WIA section 117(f)(1); and
 - (v) Community-based organizations and other private organizations providing training under Sec. 663.430.
- (c) Provider eligibility procedures must be established by the Governor, as required by this subpart. Different procedures are described in WIA for determinations of "initial" and "subsequent" eligibility. Because the processes are different, they are discussed separately.

Sec. 663.508 What is a "program of training services"?

A program of training services is one or more courses or classes, or a structured regimen, that upon successful completion, leads to:

- (a) A certificate, an associate degree, baccalaureate degree, or
- (b) The skills or competencies needed for a specific job or jobs, an occupation, occupational group, or generally, for many types of jobs or occupations, as recognized by employers and determined prior to training.

Sec. 663.510 Who is responsible for managing the eligible provider process?

- (a) The State and the Local Boards each have responsibilities for

managing the eligible provider process.

- (b) The Governor must establish eligibility criteria for certain providers to become initially eligible and must set minimum levels of performance for all providers to remain subsequently eligible.
- (c) The Governor must designate a State agency (called the "designated State agency") to assist in carrying out WIA section 122. The designated State agency is responsible for:
 - (1) Developing and maintaining the State list of eligible providers and programs, which is comprised of lists submitted by Local Boards;
 - (2) Determining if programs meet performance levels, including verifying the accuracy of the information on the State list in consultation with the Local Boards, removing programs that do not meet program performance levels, and taking appropriate enforcement actions, against providers in the case of the intentional provision of inaccurate information, as described in WIA section 122(f)(1), and in the case of a substantial violation of the requirements of WIA, as described in WIA section 122(f)(2);
 - (3) Disseminating the State list, accompanied by performance and cost information relating to each provider, to One-Stop operators throughout the State.
 - (d) The Local Board must:
 - (1) Accept applications for initial eligibility from certain postsecondary institutions and entities providing apprenticeship training;
 - (2) Carry out procedures prescribed by the Governor to assist in determining the initial eligibility of other providers;
 - (3) Carry out procedures prescribed by the Governor to assist in determining the subsequent eligibility of all providers;
 - (4) Compile a local list of eligible providers, collect the performance and cost information and any other required information relating to providers;
 - (5) Submit the local list and information to the designated State agency;
 - (6) Ensure the dissemination and appropriate use of the State list through the local One-Stop system;
 - (7) Consult with the designated State agency in cases where termination of an eligible provider is contemplated because inaccurate information has been provided; and
 - (8) Work with the designated State agency in cases where the termination of an eligible provider is contemplated because of violations of the Act.
 - (e) The Local Board may:
 - (1) Make recommendations to the Governor on the procedures to be used in determining initial eligibility of certain providers;
 - (2) Increase the levels of performance required by the State for local providers to maintain subsequent eligibility;
 - (3) Require additional verifiable program-specific information from local providers to maintain subsequent eligibility.

Sec. 663.515 What is the process for initial determination of provider eligibility?

- (a) To be eligible to receive adult or dislocated worker training funds under title I of WIA, all providers must submit applications to the Local Boards in the areas in which they wish to provide services. The application must describe each program of training services to be offered.
- (b) For programs eligible under title IV of the Higher Education Act and apprenticeship programs registered under the National Apprenticeship Act (NAA), and the providers or such programs, Local Boards determine the procedures to use in making an application. The procedures established by the Local Board must specify the timing, manner, and contents of the required application.
- (c) For programs not eligible under title IV of the HEA or registered under the NAA, and for providers not eligible under title IV of the HEA or carrying out apprenticeship programs under NAA:
 - (1) The Governor must develop a procedure for use by Local Boards for determining the eligibility of other providers, after
 - (i) Soliciting and taking into consideration recommendations from Local Boards and providers of training services within the State;
 - (ii) Providing an opportunity for interested members of the public, including representatives of business and labor organizations, to submit comments on the procedure; and
 - (iii) Designating a specific time period for soliciting and

considering the recommendations of Local Boards and provider, and for providing an opportunity for public comment.

(2) The procedure must be described in the State Plan.

(3)(i) The procedure must require that the provider must submit an application to the Local Board at such time and in such manner as may be required, which contains a description of the program of training services;

(ii) If the provider provides a program of training services on the date of application, the procedure must require that the application include an appropriate portion of the performance information and program cost information described in Sec. 663.540, and that the program meet appropriate levels of performance;

(iii) If the provider does not provide a program of training services on that date, the procedure must require that the provider meet appropriate requirements specified in the procedure. (WIA sec. 122(b)(2)(D).)

(d) The Local Board must include providers that meet the requirements of paragraphs (b) and (c) of this section on a local list and submit the list to the designated State agency. The State agency has 30 days to determine that the provider or its programs do not meet the requirements relating to the providers under paragraph (c) of this section. After the agency determines that the provider and its programs meet(s) the criteria for initial eligibility, or 30 days have elapsed, whichever occurs first, the provider and its programs are initially eligible. The programs and providers submitted under paragraph (b) of this section are initially eligible without State agency review. (WIA sec. 122(e).)

Sec. 663.530 Is there a time limit on the period of initial eligibility for training providers?

Yes, under WIA section 122(c)(5), the Governor must require training providers to submit performance information and meet performance levels annually in order to remain eligible providers. States may require that these performance requirements be met one year from the date that initial eligibility was determined, or may require all eligible providers to submit performance information by the same date each year. If the latter approach is adopted, the Governor may exempt eligible providers whose determination of initial eligibility occurs within six months of the date of submissions. The effect of this requirement is that no training provider may have a period of initial eligibility that exceeds eighteen months. In the limited circumstance when insufficient data is available, initial eligibility may be extended for a period of up to six additional months, if the Governor's procedures provide for such an extension.

Sec. 663.535 What is the process for determining of the subsequent eligibility of a provider?

(a) The Governor must develop a procedure for the Local Board to use in determining the subsequent eligibility of all eligible training providers determined initially eligible under Sec. 663.515 (b) and (c), after:

(1) Soliciting and taking into consideration recommendations from Local Boards and providers of training services within the State;

(2) Providing an opportunity for interested members of the public, including representatives of business and labor organizations, to submit comments on such procedure; and

(3) Designating a specific time period for soliciting and considering the recommendations of Local Boards and providers, and for providing an opportunity for public comment.

(b) The procedure must be described in the State Plan.

(c) The procedure must require that:

(1) Providers annually submit performance and cost information as described at WIA section 122(d)(1) and (2), for each program of training services for which the provider has been determined to be eligible, in a time and manner determined by the Local Board;

(2) Providers and programs annually meet minimum performance levels described at WIA section 122(c)(6), as demonstrated utilizing UI quarterly wage records where appropriate.

(d) The program's performance information must meet the minimum

acceptable levels established under paragraph (c)(2) of this section to remain eligible;

(e) Local Boards may require higher levels of performance for local programs than the levels specified in the procedures established by the Governor. (WIA sec. 122(c)(5) and (c)(6).)

(f) The State procedure must require Local Boards to take into consideration:

(1) The specific economic, geographic and demographic factors in the local areas in which providers seeking eligibility are located, and

(2) The characteristics of the populations served by programs seeking eligibility, including the demonstrated difficulties in serving these populations, where applicable.

(g) The Local Board retains those programs on the local list that meet the required performance levels and other elements of the State procedures and submits the list, accompanied by the performance and cost information, and any additional required information, to the designated State agency. If the designated State agency determines within 30 days from the receipt of the information that the program does not meet the performance levels established under paragraph (c)(2)

of this section, the program may be removed from the list. A program retained on the local list and not removed by the designated State agency is considered an eligible program of training services.

Sec. 663.540 What kind of performance and cost information is required for determinations of subsequent eligibility?

(a) Eligible providers of training services must submit, at least annually, under procedures established by the Governor under Sec. 663.535(c):

(1) Verifiable program-specific performance information, including:

(i) The information described in WIA section 122(d)(1)(A)(i) for all individuals participating in the programs of training services, including individuals who are not receiving assistance under WIA section 134 and individuals who are receiving such assistance; and

(ii) The information described in WIA section 122(d)(1)(A)(ii) relating only to individuals receiving assistance under the WIA adult and dislocated worker program who are participating in the applicable program of training services; and

(2) Information on program costs (such as tuition and fees) for WIA participants in the program.

(b) Governors may require any additional verifiable performance information (such as the information described at WIA section 122(d)(2)) that the Governor determines to be appropriate to obtain subsequent eligibility, including information regarding all participating individuals as well as individuals receiving assistance under the WIA adult and dislocated worker program.

(c) Governors must establish procedures by which providers can demonstrate if the additional information required under paragraph (b) of this section imposes extraordinary costs on providers, or if providers experience extraordinary costs in the collection of information. If, through these procedures, providers demonstrate that they experience such extraordinary costs:

(1) The Governor or Local Board must provide access to cost-effective methods for the collection of the information; or

(2) The Governor must provide additional resources to assist providers in the collection of the information from funds for Statewide workforce investment activities reserved under WIA sections 128(a) and 133(a)(1).

(d) The Local Board and the designated State agency may accept program-specific performance information consistent with the requirements for eligibility under title IV of the Higher Education Act of 1965 from a provider for purposes of enabling the provider to fulfill the applicable requirements of this section, if the information is substantially similar to the information otherwise required under this section.

Sec. 663.550 How is eligible provider information developed and maintained?

(a) The designated State agency must maintain a list of all eligible training programs and providers in the State (the "State list").

(b) The State list is a compilation of the eligible programs and providers identified or retained by local areas and that have not been

removed under Secs. 663.535(g) and 663.565.

(c) The State list must be accompanied by the performance and cost information contained in the local lists as required by Sec. 663.535(e). (WIA sec. 122(e)(4)(A).)

Sec. 663.555 How is the State list disseminated?

(a) The designated State agency must disseminate the State list and accompanying performance and cost information to the One-Stop delivery systems within the State.

(b) The State list and information must be updated at least annually.

(c) The State list and accompanying information form the primary basis of the One-Stop consumer reports system that provides for informed customer choice. The list and information must be widely available, through the One-Stop delivery system, to customers seeking information on training outcomes, as well as participants in employment and training activities funded under WIA and other programs.

(1) The State list must be made available to individuals who have been determined eligible for training services under Sec. 663.310.

(2) The State list must also be made available to customers whose training is supported by other One-Stop partners.

Sec. 663.565 May an eligible training provider lose its eligibility?

(a) Yes. A training provider must deliver results and provide accurate information in order to retain its status as an eligible training provider.

(b) If the provider's programs do not meet the established performance levels, the programs will be removed from the eligible provider list.

(1) A Local Board must determine, during the subsequent eligibility determination process, whether a provider's programs meet performance

levels. If the program fails to meet such levels, the program must be removed from the local list. If all of the provider's programs fail to meet such levels, the provider must be removed from the local list.

(2) The designated State agency upon receipt of the performance information accompanying the local list, may remove programs from the State list if the agency determines the program failed to meet the

levels of performance prescribed under Sec. 663.535(c). If all of the provider's programs are determined to have failed to meet the levels, the designated State agency may remove the provider from the State list.

(3) Providers determined to have intentionally supplied inaccurate information or to have subsequently violated any provision of title I of WIA or the WIA regulations, including 29 CFR part 37, may be removed

from the list in accordance with the enforcement provisions of WIA section 122(f). A provider whose eligibility is terminated under these conditions is liable to repay all adult and dislocated worker training funds it received during the period of noncompliance.

(4) The Governor must establish appeal procedures for providers of training to appeal a denial of eligibility under this subpart according to the requirements of 20 CFR 667.640(b).

Sec. 663.570 What is the consumer reports system?

The consumer reports system, referred to in WIA as performance information, is the vehicle for informing the customers of the One-Stop delivery system about the performance of training providers and programs in the local area. It is built upon the State list of eligible providers and programs developed through the procedures described in WIA section 122 and this subpart. The consumer reports system must contain the information necessary for an adult or dislocated worker customer to fully understand the options available to him or her in choosing a program of training services. Such program-specific factors may include overall performance, performance for significant customer groups (including wage replacement rates for dislocated workers), performance of specific provider sites, current information on

employment and wage trends and projections, and duration of training programs.

Sec. 663.575 In what ways can a Local Board supplement the information available from the State list?

(a) Local Boards may supplement the information available from the State list by providing customers with additional information to assist in supporting informed customer choice and the achievement of local performance measures (as described in WIA section 136).

(b) This additional information may include:

(1) Information on programs of training services that are linked to occupations in demand in the local area;

(2) Performance and cost information, including program-specific performance and cost information, for the local outlet(s) of multi-site eligible providers; and

(3) Other appropriate information related to the objectives of WIA, which may include the information described in Sec. 663.570.

Sec. 663.585 May individuals choose training providers located outside of the local area?

Yes, individuals may choose any of the eligible providers and programs on the State list. A State may also establish a reciprocal agreement with another State(s) to permit providers of eligible training programs in each State to accept individual training accounts provided by the other State. (WIA secs. 122(e)(4) and (e)(5).)

Sec. 663.590 May a community-based organization (CBO) be included on an eligible provider list?

Yes, CBO's may apply and they and their programs may be determined eligible providers of training services, under WIA section 122 and this subpart. As eligible providers, CBO's provide training through ITA's and may also receive contracts for training special participant populations when the requirements of Sec. 663.430 are met.

Sec. 663.595 What requirements apply to providers of OJT and customized training?

For OJT and customized training providers, One-Stop operators in a local area must collect such performance information as the Governor may require, determine whether the providers meet such performance criteria as the Governor may require, and disseminate a list of providers that have met such criteria, along with the relevant performance information about them, through the One-Stop delivery system. Providers determined to meet the criteria are considered to be identified as eligible providers of training services. These providers are not subject to the other requirements of WIA section 122 or this subpart.

WORKFORCE INVESTMENT ACT

**ELIGIBLE TRAINING PROVIDER LIST
(ETPL)**

APPLICATION PACKAGE



PRIVATE INDUSTRY COUNCIL
of San Francisco, Inc.

*creating
employment
opportunities*

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SEPTEMBER 2000

The first part of the paper discusses the importance of the research and the objectives of the study. It then proceeds to a literature review, followed by a description of the methodology used. The results of the study are presented in the next section, followed by a discussion of the findings and their implications. The paper concludes with a summary of the main points and suggestions for future research.

The research was conducted in a laboratory setting, using a series of experiments to measure the effects of different factors on the outcome variable. The results show that there is a significant relationship between the variables studied, and that the findings have important implications for the field of research.

The methodology used in this study was a combination of qualitative and quantitative methods, allowing for a comprehensive understanding of the phenomenon being investigated. The data collected was analyzed using statistical software, and the results were compared to previous studies in the field.

The findings of the study indicate that there is a positive correlation between the variables studied, and that this relationship is mediated by a number of factors. These findings have important implications for the field of research, and suggest that further investigation is needed in this area.

In conclusion, this study has provided valuable insights into the relationship between the variables studied, and has identified a number of factors that mediate this relationship. The findings have important implications for the field of research, and suggest that further investigation is needed in this area.

Introduction

The Private Industry Council of San Francisco, Inc. is now accepting applications from training providers for nomination to the State Eligible Training Provider List (ETPL). As of July 1, 2000, all California training providers must be on the ETPL in order to receive Workforce Investment Act (WIA) funds for training services provided to adults and dislocated workers. The State, in partnership with local Workforce Investment Boards, which oversee and direct local WIA activities, will develop and maintain the ETPL. This comprehensive database will be used to collect and share information on training providers, their services, and the quality of their programs. Only those training institutions (vocational schools, trade schools, etc.) that meet specified criteria and that appear on the list will be eligible to accept referrals of WIA funded students.

In our role as the administrative staff for the San Francisco Local Workforce Investment Board (LWIB), the Private Industry Council, Inc. recommends that training providers located within San Francisco County submit an application using the procedures outlined in the Local Policies and Procedures, pages 1-4. We also recommend that Training Providers located outside of San Francisco submit an application to their nearest LWIB for the geographic area of their principle place of business.

Applicants should be willing to function as part of the local workforce investment system and agree to form linkages, advance the referral process, and provide the data necessary to make such a system operational. The One-Stop service delivery system, which includes both physical centers and electronic connectivity, is pivotal in unifying a variety of programs and services into a single customer-focused system. Therefore, all training providers must be willing to connect participant activities with the One-Stop system, so that our customers have enhanced access the services offered by the system.

Technical assistance questions should be directed to Cathy deCristofaro at (415) 431-8700, ext.308. You can also send any questions or comments to etpl@picsf.org.

The Private Industry Council encourages you to submit your applications.

CONTENTS

Local Policies and Procedures

General Information.....	page 1
Initial Eligibility.....	page 1
Subsequent Eligibility.....	page 3
Appeals Process.....	page 3
General Conditions.....	page 4

Appendix

Assurances Statement

ETPL Provider Application

ETPL Program Application

Local Policies and Procedures

General Information

Training providers interested in applying for ETPL eligibility should complete and submit a Service Provider Application and a separate Training Program Application for each unique training program to be listed on the ETPL. Specifically, the list identifies individual training programs rather than training institutions. It is possible that only a portion of an institution's available training programs would be approved for the state list.

Copies of the ETPL forms and the ETPL Forms Handbook may be obtained from the PIC. The forms and the handbook can also be downloaded from the following web site:

<http://www.calwia.org/documents.html>

For more information regarding the ETPL and WIA, please consult the following resources on the Internet:

From the State level:

California State's website:

<http://www.calwia.org/>

What is WIA?:

<http://www.edd.ca.gov/wiand.htm>

From the Federal Level:

U.S. Workforce:

<http://usworkforce.org/resources/categories.htm>

Excerpts from the WIA Interim Final Rule that describe Eligible Training Providers:

<http://usworkforce.org/resources/stateplans/etp-finalrule.htm>

Initial Eligibility

To submit Eligible Training Provider List (ETPL) applications to the Private Industry Council, training providers should do the following:

1. Complete the applications, using the line item instructions provided in the ETPL Forms Handbook (referenced above.)

Training providers are eligible to apply if they meet at least one of the following criteria:

- A. Providers who are eligible to receive funds under the Higher Education Act of 1965 and whose programs lead to an associate or baccalaureate degree or a certificate.
- B. Providers that carry out programs under the Act of August 16, 1937 (National Apprenticeship Act).
- C. Providers who meet at least one of the following:
 - a. Accreditation by an institution recognized by the federal Department of Education,
 - b. Approval by the California Department of Education,

- c. Approval by the Chancellor's Office of the California Community Colleges,
- d. Approval of the program by California Bureau for Private Postsecondary and Vocational Education,
- e. Special Registration of the program by BPPVE,
- f. Demonstration of sufficient evidence of program effectiveness*,
- g. Demonstration of sufficient evidence of employer support for the program*,
- h. Designation as an authorized training provider for industry-specific training*.

* = Criteria for the determination of program effectiveness, employer support and industry authorized training is described below.

2. If your organization has indicated that a training program has proven effectiveness, industry support, and/or industry authorization, and this is the sole criteria for eligibility determination (see item C above), you will be asked to submit following verifiable information with the program application:
 - **proven effectiveness – line item # 33**
Documentation providing evidence that the training program has been proven effective. Your supporting documentation will be reviewed and evaluated. Examples of evidence could include placement statistics, past performance records, program completion rates, etc.
 - **employer support – line item # 34**
Documentation that supports the claim that the training program is and will be supported by employers. Examples of documentation could include letters from employers stating that they have hired participants who have completed the training program with favorable results and would continue to do so in the future.
 - **industry authorized – line item # 35**
Documentation verifying that the training curriculum complies with criteria determined by a specific industry provided by a representative of that industry.
3. For technical assistance, call the Private Industry Council at (415) 431-8700.
4. Deliver or mail one copy each of the ETPL Applications to:
 - Private Industry Council - ETPL
 - 1650 Mission Street, Suite 300
 - San Francisco, CA 94103

If your application is approved by the PIC, it will be electronically forwarded to the California State Workforce Investment Board for final approval (the state is required to approve or disapprove within 30 days. Once approved, the training provider will be listed on the State's Eligible Training Provider List.

An on-site visit may be performed by PIC staff prior to application approval.

5. Once your training program appears on the state's WIA Eligible Training Provider List, the Private Industry Council will provide you with an *Assurances Statement* for your review and signature. Return it by mail to the PIC along with any other requested documentation.

Subsequent Eligibility

All programs that are initially listed on the ETPL must be determined, within 18 months of initial listing and annually thereafter, to be eligible to remain on the ETPL. Subsequent eligibility determination data will be required no later than December 31, 2001 for programs listed. The data would cover activities from initial listing through June 30, 2001 and include *seed data* on all students who exited a program during that period, whether they completed the program or quit for any reason. The Local Workforce Investment Board and training providers will collect and report *seed data* to the State. This is data on individuals that are used to help calculate performance measures for programs' subsequent eligibility for continued listing on the ETPL. The elements are reported by training providers for the non-WIA students in programs with those WIA participants. These elements for *seed data* include:

- Social Security number;
- Demographic information (age, ethnicity, etc.); and
- Whether the individual received a license, certificate degree, etc.

The State will use *seed data* to access the quarterly wage records and will then calculate all of the performance measures required for subsequent eligibility.

Note that training providers will be asked to describe how they will collect and report the data necessary for subsequent eligibility determination.

Appeals Process

Appeals to Local Boards:

A provider wishing to appeal an unfavorable decision by the Local Board must submit an appeal to the Local Board within 30 days of the issuance of the denial notice. The appeal must be in writing and include a statement of the desire to appeal a denial decision, specification of the program in question, the reason(s) for the appeal (i.e. grounds), and the signature of the appropriate provider official.

The first step in the appeals process will be an informal meeting between the Local Board staff and the appealing provider.

The second step will be a hearing. The hearing officer shall be an impartial third party. The hearing officer shall provide written notice to the concerned parties of the date, time, and place of the hearing at least ten (10) calendar days before the scheduled hearing. Both parties shall have the opportunity to present oral and written testimony under oath; to call and question witnesses; to present oral and written arguments; to request documents relevant to the issues(s); and to be represented.

The Local Board must notify a provider of its final decision on an appeal within 60 days of receipt of the appeal. This period includes a hearing if requested by the provider.

Appeals to EDD (State):

This procedure applies only to an appeal by a training provider based on an EDD (State) denial of the provider's application for initial listing on the ETPL or the de-listing of a program already listed on the ETPL. In addition, a provider may appeal to EDD if it has exhausted the appeals process of a Local Board and is dissatisfied with the Local Board's final decision.

A provider wishing to appeal to EDD must submit an appeal request to EDD within 30 days from either the issuance of a denial notice or the provider's notification of a Local Board's final decision on an appeal. The request for appeal must be in writing and include a statement of the desire to appeal, specification of the program in question, the reason(s) for the appeal (i.e. grounds), and the signature of the appropriate provider official.

EDD will promptly notify the appropriate Local Board when EDD receives a request for appeal. EDD will also notify the appropriate Local Board when EDD makes the final decision on an appeal. EDD will administratively review an appeal, make a preliminary decision, and notify the provider. EDD can either uphold or reverse the appealed decision, or EDD can refer the appeal to the California Unemployment Insurance Appeals Board (CUIAB). EDD will also refer an appeal to the CUIAB if the provider requests a hearing in writing within 15 days of the issuance of EDD's preliminary decision. CUIAB will schedule a hearing with an administrative law judge whose decision will be issued within 60 days of the appeal being referred to the CUIAB or within 30 days of the closing of the record.

The administrative law judge shall provide written notice to the concerned parties of the date, time, and place of the hearing at least ten (10) calendar days before the scheduled hearing. Both parties shall have the opportunity to present oral and written testimony under oath; to call and question witnesses; to present oral and written arguments; to request documents relevant to the issues(s); and to be represented. The decision of the CUIAB administrative law judge is the final administrative decision.

General Conditions

Applicants must be willing to function as part of our local workforce investment system and agree to all program linkages, referral processes and data collection methods necessary to make such a system operational. The One Stop service delivery system, which includes both physical centers and electronic connectivity, is pivotal in unifying a variety of programs and services into a single customer-friendly system. Therefore, training providers must be willing to connect participant activities with the One Stop system, so that consumers can access the services offered through the system.

The PIC reserves the right to request additional information or documentation.

The PIC reserves the right to verify all information in the application.

Funded service providers shall be subject to all applicable federal, state, and local policies and regulations.

ETPL Assurances Statement

As a the authorized representative for a training provider with programs listed on California's Eligible Training Providers List (ETPL), I hereby certify that:

- We are aware of the current California State policy for "subsequent eligibility determination" requiring the submission of the individual data on every student enrolled in each program that the Private Industry Council has nominated to the list.
- We agree to maintain sufficient and current records to support all data submissions to the ETPL.
- We will make these records available for monitoring or audit by either the Local Board or the State.
- We have included a narrative statement (below) describing how our agency plans to collect and report the required data.

Name of Organization

Name and Title of Provider Representative

Signature of Provider Representative

Date

WORKFORCE INVESTMENT ACT TRAINING PROVIDER APPLICATION

EDD Employment Development Department State of California WORKFORCE INVESTMENT ACT TRAINING PROVIDER APPLICATION				01 Provider Code (FEIN)	
				For Internal Office Use Only	
				02 Subgrantee Code	
				03 Agency Code	
				04 Local Provider Code	
05 Provider Name				06 Legal Name (if different)	
07 Mail Address				08 ZIP	
09 Main Phone ()		10 Main E-Mail		11 Web site Address	
12 Administrative Contact Name		13 Administrative Contact Title		14 Administrative Contact E-mail	
15 Administrative Contact Phone ()		16 Administrative Contact Fax ()		17 Admissions Phone (if different) ()	
				18 Financial Aid Phone (if different) ()	
19 Accreditation 1 Yes 2 No		20 Accrediting Body			
21 HEA Eligible (Pell Grant) 1 Yes 2 No		22 Financial Aid Available 1 Yes 2 No		23 Online Registration Available 1 Yes 2 No	
24 Institution Type 1 Public 2 For-profit 3 Non-profit Religious 4 Non-profit Public benefit 5 Mutual 6 Other		25 Provider Type 1 University 2 College 3 Faith Based Organization 4 Community Based Organization (CBO) 5 Vocational 6 Postsecondary 7 ROC/P 8 Other		Additional Services 26 Job Placement Assistance 1 Yes 2 No 27 Career Assessment 1 Yes 2 No 28 Career Counseling 1 Yes 2 No 29 Tutorial Services 1 Yes 2 No 30 ESL Courses 1 Yes 2 No 31 GED Assistance 1 Yes 2 No 32 On-site Childcare 1 Yes 2 No 33 Other 1 Yes 2 No	

ETPL EPVA (04/01/00)
(Internet)



Employment
Development
Department

State of California

WORKFORCE INVESTMENT ACT TRAINING PROGRAM APPLICATION

01 Provider Code (FEIN) 02 CIP Code			For Internal Office Use Only		
			Program Code		
			03 Subgrantee Code		
			04 Agency Code		
			05 Date Received by LWIB		
			06 Local Program Code		
Provider Name					
07 Program Name			08 Program Description		
09 Training Site Address			10 City, State		11 Zip
					12 County
13 Listed on Other State's ETPL		14 ADA Compliant		15 Total Hours of Instruction	
1 Yes 2 No		1 Yes 2 No		16 Credits	
				17 Non-Credit	
				18 Credit Time	
19 Total Program Cost		20 Mode of Delivery		21 When Program is Offered	
22 Tuition \$ _____		23 Stand-up		24 Frequency of Offering	
25 Fees \$ _____		26 Internet		27 Weekly	
28 Expenses \$ _____		27 Correspondence		28 Monthly	
		28 Broadcast		29 Quarter	
		29 Computer Based Instruction		30 Semester	
TOTAL \$ _____				31 Other	
				32 BPPVE Approval Status	
				33 Approved	
				34 Temporary Approval	
				35 Registered	
				36 Not Applicable	
				37 BPPVE Approval Expiration Date	
28 Other BPPVE Approved Programs		29 Registered Apprenticeship		30 Registered Date	
1 Yes 2 No		1 Yes 2 No		Other List Criteria	
				31 CDE Approved	
				32 COCCC Approved	
				33 Proven Effectiveness	
				34 Employer Support	
				35 Industry Authorized	
				1 Yes 2 No	
				1 Yes 2 No	
				1 Yes 2 No	
				1 Yes 2 No	
				1 Yes 2 No	
				1 Yes 2 No	
36 Continuing Education Units (CEU)		37 CEU Granting Institution			
38 Resources Required		39 Program Goal		40 Credentialing Body	
1 Yes		1 Skill Attainment		41 Projected Hourly Wage After Program Completion	
2 No		2 Certificate			
		3 Registration			
		4 License			
		5 Associate Degree			
		6 Baccalaureate Degree			
		7 Other			
42 Prerequisites					
43 Skills Sets					

ETPL EPGA (Rev. 04/00)
(Internet)

WIA Training Program Application (continued)

44 Curriculum		45 Relevant Occupations (SOC/O*NET Code)	
Course Code	Course Title	Code	Title
46 Relevant Occupation Recommendation SOC/O*NET Category Description			
Accessibility 47 On-Site Parking 1 Yes 2 No 48 Public Transportation 1 Yes 2 No 49 Disabled Student Access 1 Yes 2 No 50 Sign Language 1 Yes 2 No 51 Other Languages 1 Yes 2 No 52 Other 1 Yes 2 No		53 Target Audience 54 Average Class Size 55 Equipment To Be Used	
Initial Performance Information			
56 Period Begin Date	57 Period End Date	58 Participant Universe	59 Average Hourly Wage at Placement
60 Program Completion Rate	61 Entered Employment Rate	62 Skill/Credential Attainment Rate	63 Retention Rate
<i>Assurance text will be supplied at a later date.</i>			
64 Printed Name of Provider Representative		65 Title	66 Date
Signature			

ETPL EPGA (Rev. 04/00)
(Internet)

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING OF THE WORKFORCE INVESTMENT SAN FRANCISCO BOARD

ONE STOP COMMITTEE

DOCUMENTS DEPT.

OCT 29 2001

SAN FRANCISCO
PUBLIC LIBRARY

Date: Friday, November 2, 2001
Time: 10:00 a.m. – 12:00 noon
Location: SF Community College District Office
Auditorium
33 Gough Street
San Francisco CA 94103

AGENDA APPEARS ON THE REVERSE SIDE

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below.

If you require special accommodations due to a disability, contact Roberta Fazande at least 72 hours in advance at 415/923-4265, TDD 800/735-2929 (CRS) or rfazande@picsf.org.

KNOW YOUR RIGHTS UNDER THE SUNSHINE ORDINANCE (Chapter 67 of the San Francisco Administrative Code)

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

Copies of the Sunshine Ordinance can be obtained at the San Francisco Public Library online at the City's Web site at www.ci.sf.ca.us/infoctr/sunshine/index.htm

OTHER ACCOMMODATIONS

In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.

Revised: Thursday, October 25, 2001

PROPOSED AGENDA

Public testimony will be taken throughout the meeting

1. Adoption of the Agenda (*Action Item*)
2. Approval of the Minutes (*Action Item*)*
3. Presentation on eMae Case Management System (*Information Item*)
4. One Stop Technology Project Report (*Information Item*)
5. Status report on the One Stop Partner Memoranda of Understanding and the One Stop Consortium / WIB Agreement (*Information /Discussion Item*)
6. Discussion of the approval of the Access Point Definition (*Discussion Item*)*
7. NYATEP Technical Assistance Report (*Discussion Item*)*
8. Public Testimony on Non-Agenda Items (*Discussion Item*)
9. Future Agenda Items (*Discussion Item*)

**Information enclosed.*

OCT 29 2001

SAN FRANCISCO
PUBLIC LIBRARY

DATE: October 23, 2001

MEMORANDUM

A Partnership
for Employment

TO: ONE STOP COMMITTEE
MAYOR WILLIE L. BROWN, JR.

FROM: DEVRA EDELMAN, CHAIR *Devra Edelman*
ONE STOP ACCESS POINT COLLABORATIVE

SUBJECT: DISCUSSION AND APPROVAL FOR A DEFINITION OF ONE
STOP ACCESS POINT PARTNERS

Administrative Office

1650 Mission Street, Suite 300
San Francisco, CA 94103
(415) 431-1900
Fax (415) 431-8702
<http://www.onestopsf.org>

Career Link Center

3120 Mission Street
San Francisco, CA 94110
(415) 749-7503
Fax (415) 749-7476

Northeast Career Center

1428 Bush Street
San Francisco, CA 94109
(415) 353-5207
Fax (415) 353-5225

Southeast Career Center

1800 Oakdale Avenue
San Francisco, CA 94124
(415) 695-5062
Fax (415) 695-5099

Partners

City College of San Francisco

Committee of Contracting Agencies

San Francisco Department of Human Services

National Council on the Aging

Private Industry Council of San Francisco

San Francisco Employer's Advisory Council

San Francisco Unified School District

State Department of Rehabilitation

State Employment Development Department

and over 40
community-based organizations
serving as One Stop
Access Points

The One Stop Committee is asked to review, discuss, and approve the enclosed draft Definition of One Stop Access Point Partners. As well as describing the roles and responsibilities of the Access Points, this statement also includes numerous methodologies for providing information about the One Stop system to all consumers. As an integral part of what it means to provide "access" to the system, these methods for sharing information will serve as the basis for Access Point participation.

BACKGROUND

The One Stop Access Point Collaborative is a partnership consisting of approximately 38 private, community based and public organizations working together to ensure that the One Stop workforce development system is designed to meet the needs of our existing service structure, as well as the needs of the specific populations that we serve. This collaboration was originally convened in January 1998 by the One Stop staff of the Private Industry Council of San Francisco. Since that time, the Access Point Collaborative has been an integral part of the planning process for the One Stop system - from implementing the foundation for electronic connectivity through a technology grant, to direct participation in the development of the One Stop web site.

The Workforce Investment Board has been appointed to implement the Workforce Investment Act of 1998, to develop local workforce development policy, and to explore resources for a broader, more inclusive service delivery system for San Francisco. Thus, in order to insure that the role of Access Point agencies is considered in this system, the Access Point Collaborative is advocating for the clarification and approval of the definition of what it means to be an Access Point agency in the local One Stop system.

This definition has been reviewed and approved by the Access Point Collaborative and a final, approved definition is needed in order to move forward with the development and signing of Memoranda of Understanding between each Access Point agency and the Workforce Investment Board. Furthermore, this definition is past due, considering that all agencies receiving Workforce Investment Act funds are required to serve as Access Points and that contracts for these funds have been initiated without a full definition of the roles and responsibilities of the Access Points.

Please contact me at 415-503-4480 if you have questions or concerns. I will be available at the meeting to answer your questions.

DRAFT DEFINITION OF ONE STOP ACCESS POINT PARTNERS

The cornerstone of the new workforce investment system, heralded by the 1998 Workforce Investment Act, is One Stop service delivery. This system makes available numerous training, education, and employment programs through a single customer-focused, user-friendly service delivery system at the local level. This system will provide for its primary customers – employers and job, education and training seekers – a comprehensive array of useful information and wide and easy access to needed services.

In an effort to create a system that is truly universally available to employers and to all job, education and training seekers in San Francisco, a variety of government, industry, academic institutions and community based organizations must work collaboratively. The Access Point Collaborative is an effort on the part of community based organizations, academic institutions and public entities to ensure that access to jobs, education and training in San Francisco is universally available. As such, the Access Point Collaborative will act in an advisory and supportive capacity with the local Workforce Investment Board (WIB) to provide linkages to the community.

Participants in the Access Point Collaborative agree to provide access to the San Francisco One Stop System through referrals and information made readily available to all upon request (universal access). Access Partners will thus:

- Provide information about local job training, education, employment and supportive services.
- Provide referrals to entities that connect customers with and/or perform the above services.

Information and referrals may be provided through various methodologies, such as:

- Written information in the form of posters, brochures and charts.
- Telecommunications such as a toll free number with recorded information and/or an operator.
- Electronic access to information via the Internet.
- Personal interactions such as one-to-one advising or group orientations.

Each Access Point partner agrees to provide customer-focused information and referrals in an objective manner based upon the client's needs.

Workforce Investment Act:

Better Guidance Needed to Address Concerns Over New Requirements

GAO Report 02-72, October 2001

Available On-Line at www.gao.govOCT 29 2001
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In the past, when the Government Accounting Office (GAO) issued a report on workforce issues, it was not necessarily something the local system looked forward to reading. That is not the case with the new Workforce Investment Act report issued on October 4. This new report, prepared at the request of Senators Edward Kennedy and James Jeffords, is important because it is the first post-WIA implementation report issued by GAO on how the implementation is progressing. It focuses on three key issues that are fundamental to the successful implementation of the WIA:

1. mandatory partners' participation in one-stops;
2. job seekers' ability to receive enhanced choices for training; and
3. private-sector participation on workforce boards.

As the title of the report suggests, most of the focus of the report is on the failure of the federal oversight agencies to provide clear guidance to state and local implementers on issues that have emerged as the implementation has moved forward. The report acknowledges that USDOL and other federal agencies issued guidance to help begin the implementation process, but notes that what is needed now is guidance that addresses specific concerns that have arisen in the critical early stages of operating the new system. While USDOL and Education, in their comments on the report, highlight the importance of state and local flexibility in implementing WIA, the GAO responds that "guidance can be detailed without being prescriptive, and that federal partners play a vital role in helping state and local implementers optimize the flexibility provided by WIA."

While the federal agencies lack of clear guidance is the recurring theme of the report findings, **local areas will be especially interested in the concerns raised regarding private-sector involvement in workforce boards.** Here the comments from private-sector board members interviewed are quite critical of board structures and staffing. Unfortunately the report lumps issues raised by state workforce board members and local workforce board members together, at times making it difficult to identify whether the concern came from a state or local member. Regardless of this shortcoming, and it is a major one, this section of the report is worth careful consideration to determine if the concerns raised ring true for the local WIB in your area.

In preparing the report, the GAO met with officials from USDOL, Department of Education, HHS, and HUD, plus representatives from national workforce organizations. They also met with state and local officials in three states – California, Vermont and Pennsylvania – including six local areas and nine one-stops.

The Issues

Partner Participation in One-Stops

Despite efforts being made by required one-stop partners to participate in local one-stops, the GAO found that programmatic and financial concerns are limiting their participation and their ability to integrate their services in one-stops.

1. Several partners feared that one-stop participation would alter their traditional service delivery methods and could adversely affect the quality of services to their eligible populations. Among the issues raised by partner agencies are:
 - a. that they currently provide full access to their services without participating in one-stops;
 - b. because of the type of individuals served or the method in which services are provided, they question the value of participation in one-stops;

A NYATEP Technical Assistance Report: October 11, 2001

- c. there may be few eligible individuals for their program in the area, which does not justify the cost and staff time involved in one-stop participation.
2. Several were concerned that integration of services could lead them to serve individuals who are ineligible for services.
 - a. This issue was raised most often by vocational rehabilitation programs and veterans' employment and training, but also by adult education.
 - b. Although voc rehab regulations affirm that these programs must participate in one-stops, the regs also note that participation must be consistent with existing program requirements. The lack of explicit guidance leads to continued confusion and hesitancy by state and local providers to engage in new approaches to service delivery.
 - c. The GAO has issued a separate report regarding the need to amend the VETS program to bring it in line with the current workforce investment system. The segregation of the VETS program from the rest of the system does not serve veterans well. See GAO report 01-928 issued 10/2/01.
3. Resource constraints limit partners' ability to fully integrate their services at one-stops.
 - a. Overall funding levels do not allow for partner programs to cover expenses related to the one-stop in addition to expenses for their existing offices, or to develop costly electronic linkages with the ones-top system. This is true for partners large and small. Existing leases have prohibited many partner agencies including the Employment Service from collocating in many areas. As a result, in many one-stops, few partners are making monetary contributions. The WIA Adult and Dislocated Worker programs and ES programs are often the only partners bringing cash to the one-stop. Other partners tend to make in-kind contributions.
 - b. Some partners report that OMB and agency guidance for cost accounting and cost allocation are not adequate for the WIA environment where costs may need to be allocated across programs with differing or competing missions. As a result, partners tend to not share resources, supplies, and equipment.
 - c. There are also concerns about how to account for personnel who, in the process of providing services, may potentially serve ineligible populations.
 - d. Despite these problems, some ones-tops are bringing in additional paying partners, such as businesses and non-profits, to provide additional funds to support one-stop operations.

The agencies that oversee the partner programs, USDOL and Education, have not provided guidance as to how mandatory partners can resolve these concerns.

Enhanced Choices for Training

An unintended outcome of the eligible training provider provisions of WIA, especially the data and reporting requirements for subsequent eligibility, has been that training options for job seekers may be diminishing rather than improving as training providers reduce the number of course offerings they make available to WIA funded participants. The data collection burden on training providers can be significant and may drive training providers out of the WIA system. Lack of consistency in data reporting definitions, such as "program completer", between WIA and other funding streams, such as Perkins, further exacerbates the problem, all the more so when considering the small number of WIA funded training participants a training provider may be serving.

Specifics raised by training providers include:

1. Whether the data required on all students, not just WIA funded, provides meaningful information, since the motives of the trainee are not necessarily the purposes of WIA programs.
2. The reliability of UI wage reporting, especially given the time lag in getting the data.

A NYATEP Technical Assistance Report: October 11, 2001

3. Privacy concerns and inconsistency related to the federal law, FERPA (the Family Educational Rights and Privacy Act), which generally prohibits educational institutions from disclosing student information including social security numbers;
4. Given the small number of WIA funded trainees in many training programs, the data collection and reporting requirements are extremely burdensome, resulting in significant drops in number of training programs and training providers in the system.
5. Some of the causes for the drop-off in WIA funded training may be –
 - a. “work first” approaches have limited training referrals in many local areas;
 - b. in the strong economy, employers wanted workers immediately, not after training;
 - c. because WIA programs have had to bear the greatest share of the costs of establishing one-stops, there has been little money left for training services; and
 - d. additional performance measures for WIA training participants beyond the performance measures for non-training adults and dislocated workers may be discouraging training.

Guidance from USDOL and Education has not addressed how training providers can provide this information cost-effectively. There has been work ongoing by a group of state representatives to consider how to address some of these training provider concerns and to avoid a continued decline in available training options for WIA participants that has been experienced in some states.

Tony Joseph from the NYSDOL Division of Research and Statistics has been participating on this group and will share some of the issues being discussed and how the subsequent eligibility process may work in New York State in a workshop at the Fall Workforce Conference in Rochester on Thursday, October 18. The session is “*WIA Eligible Training Provider Implementation – Now What?*”

Private-Sector Involvement on Workforce Boards

The GAO report looks at both State WIBs and Local WIBs when considering concerns about private-sector involvement. Several concerns are examined:

1. The large size of the Boards make efficient conduct of business difficult.
 - a. General Motors’ Board of Directors has 13 members, Intel has 11.
 - b. The large board size makes scheduling meetings difficult and makes achieving a quorum a problem.
 - c. Getting information to board members prior to meetings, keeping members apprised of board activities and reaching agreement on important issues is difficult with such large boards.
 - d. Especially in the start up year just past, when much board time had to be devoted to administrative tasks and process rather than focusing on outcomes and broad strategic goals, private-sector board members have been frustrated.
2. Committee structures established to accommodate the large Board size may not accurately reflect the views and perspective of the private-sector members.
 - a. The downside of this approach is the potential dilution of private-sector influence if private-sector board members are not included on the committees.
 - b. Some board members stated that they felt alienated when they were underrepresented or not represented on the committees.
 - c. The GAO found that committees at both the state and local levels had little private-sector membership.
3. Board day-to-day operations are typically carried out by public-sector staff with few ties or little understanding of the employer community.
 - a. This is the section of the report that is most critical of local and state level staff.
 - b. Private-sector board members question how staff can carry out duties serving the board when they report to supervisors in public agencies.

- c. Some complain that board staff fail to provide key information for meetings early enough for them to prepare, leaving them unable to participate in meetings to the same extent as public officials.
- d. Some question whether public-sector staff have sufficient understanding of the environment in which business representatives operate.
- e. Some express concern that staff experienced in job training systems may be hesitant to embrace WIA's vision of a more private-sector driven and strategic system.

As noted in the introduction above, the report does not clearly distinguish problems found at the state board level from the local board level. **However, at a time when private-sector support for the system is more critical than ever, it is important to assess whether these concerns apply in your local area.** Since funding decisions by Congress will be based to a large extent on their perception of the ability of our system to meet business needs and to make an immediate impact on current economic conditions, this is a very dangerous time to have frustrated or disenfranchised private-sector board members. You are encouraged to assess your current board situation in relation to the issues raised in the GAO report and, as appropriate, work with your private-sector members to address their concerns.

The report notes that, while USDOL has provided information related to Boards, it has not issued specific guidance to help states and localities address these issues. Information is lacking on how to balance the requirements of board operations with the needs of the private sector.

Conclusions and Recommendations

The three issues investigated in this report are critical to the growth of the WIA system. The report concludes that unless the concerns raised are addressed, there is a risk that the flexibility provided under WIA will continue to lead to confusion, unnecessary burden and resistance to change, rather than fostering innovation. In a chilling observation, the report suggests that not only may WIA fail to achieve the vision of one-stop service integration, it could result in additional program requirements, and the opportunity to foster fundamental change in the system could be lost. Some of the concerns current in the system at this time are the result of confusion about what states and localities can already do without additional flexibility. The report notes that states and localities need time to better understand and embrace new ways of operating. Better guidance from the federal agencies on options available are needed:

1. Information on the benefits of integrating services through one-stops;
2. Cost effective methods for training provider data collection and reporting, coupled with allowing an additional year of initial eligibility exempt from data collection requirements while implementers resolve ways of dealing with this concern; and
3. Ensuring that local areas and states understand and implement ways to achieve effective workforce investment board operations that meet private-sector needs.

Also of interest related to the WIA report is testimony provided by Sig Nilsen, the author of the report, on October 4 to the Senate HELP committee, which is available at www.gao.gov. Look for GAO-02-94T.

If you have questions regarding this summary, contact Russ Simon at rsimon@nyatep.org or by phone: 518-465-1473.

SF

N74.56

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2002

Workforce Investment San Francisco
One Stop Committee
2002 Meeting Dates

Wednesday, January 30, 2002

1:00 p.m. – 3:00 p.m.



Wednesday, February 27, 2002

1:00 p.m. – 3:00 p.m.



Wednesday, March 27, 2002

1:00 p.m. – 3:00 p.m.



Wednesday, April 24, 2002

1:00 p.m. – 3:00 p.m.



Wednesday, May 22, 2002

1:00 p.m. – 3:00 p.m.



Wednesday, June 26, 2002

1:00 p.m. – 3:00 p.m.



Wednesday, July 24, 2002

1:00 p.m. – 3:00 p.m.

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Wednesday, August 28, 2002

1:00 p.m. – 3:00 p.m.



Wednesday, September 25, 2002

1:00 p.m. – 3:00 p.m.



Wednesday, October 23, 2002

1:00 p.m. – 3:00 p.m.



Wednesday, November 27, 2002

1:00 p.m. – 3:00 p.m.



Wednesday, December 25, 2002

1:00 p.m. – 3:00 p.m.

Location for the above dates:

**Community College District Office
33 Gough Street
Auditorium**

Workforce Investment San Francisco

Local Workforce Investment Board for the City and County of San Francisco

01-24-02A11:05 RCPD

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NOTICE OF A PUBLIC MEETING OF THE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD ONE STOP COMMITTEE

JAN 24 2002

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Date: Wednesday, January 30, 2002
Time: 1:00 P.M. - 3:00 P.M.
Location: Community College District Office
Auditorium
33 Gough Street
San Francisco, CA 94103

AGENDA APPEARS ON THE REVERSE SIDE

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Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

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OTHER ACCOMMODATIONS

In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.

Issued: January 22, 2002

PROPOSED AGENDA

1. Welcome and Introductions
2. Adoption of the Agenda (*Action Item*)
3. Approval of the Minutes for December 5th meeting (*Action Item*)
4. Public Testimony on Agenda Items (*Discussion Item*)
5. Update – One Stop Technology Project (*Discussion Item*)
6. Career Link Center Report (*Information Item*)
 - Consortium Charter*
 - Updated Compliance Matrix and Expenditure Report*
7. Accessibility Workgroup Report (*Discussion Item*)
8. 2002 Strategic Planning Session (*Discussion Item*)
9. Future Projects (*Information Item*)
10. Public Testimony on Non-Agenda Items (*Discussion Item*)
11. Future Agenda Items (*Discussion Item*)
12. Adjournment (*Action Item*)

*Materials provided at meeting.

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Workforce Investment San Francisco

Local Workforce Investment Board for the City and County of San Francisco

**NOTICE OF A PUBLIC MEETING
OF THE**

WORKFORCE INVESTMENT SAN FRANCISCO BOARD

ONE STOP COMMITTEE

15-20-0000000000000000
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MAR 22 2002

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Date: Wednesday, March 27, 2002
Time: 1:00 P.M. – 3:00 P.M.
Location: Community College District Office
Auditorium
33 Gough Street
San Francisco, CA 94103

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If you require special accommodations due to a disability, contact Roberta Fazande at least 72 hours in advance at 415/923-4265, TDD 800/735-2929 (CRS) or rfazande@picsf.org.

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Issued: March 20, 2002

Proposed Agenda

1. Adoption of the Agenda (*Action Item*)
2. Approval of the Minutes for January 30, 2002 (*Action Item*)*
3. Public Testimony on Agenda Items (*Discussion Item*)
4. Presentations (*Information Item*)
 - a. WIA & One Stop Overview
 - b. One Stop San Francisco System
 - c. Operator Consortium
5. One Stop Committee Workgroup Reports (*Discussion Item*)*
 - a. One Stop Marketing
 - b. One Stop Technology
 - c. Next Steps
6. Public Testimony on Non-Agenda Items (*Discussion Item*)
7. Future Agenda Items (*Discussion Item*)
8. Adjournment (*Action Item*)

*Information to be sent.

Workforce Investment San Francisco

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING OF THE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD ONE STOP COMMITTEE

Date: Wednesday, March 27, 2002
Time: 1:00 P.M. – 3:00 P.M.
Location: Community College District Office
Auditorium
33 Gough Street
San Francisco, CA 94103

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Revised: March 22, 2002

Revised Proposed Agenda

1. Adoption of the Agenda (*Action Item*)
2. Approval of the Minutes for January 30, 2002 (*Action Item*)*
3. Public Testimony on Agenda Items (*Discussion Item*)
4. Presentations (*Information Item*)
 - a. WIA & One Stop Overview
 - b. One Stop San Francisco System
 - c. Operator Consortium
5. One Stop Committee Workgroup Reports (*Action Item*)*
 - a. One Stop Marketing
 - b. One Stop Technology
 - c. Next Steps
6. Public Testimony on Non-Agenda Items (*Discussion Item*)
7. Future Agenda Items (*Discussion Item*)
8. Adjournment (*Action Item*)

*Information enclosed.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: ROSALIE BULACH
CHAIR, ONE STOP COMMITTEE

DATE: MARCH 22, 2002

FROM: ONE STOP MARKETING WORKGROUP



SUBJECT: REPORT ON ONE STOP MARKETING ACTIVITIES

As the Marketing Workgroup for the One Stop Committee of the local Workforce Investment Board, we submit for your consideration the following report, which contains both findings and recommendations. The report is meant to inform the One Stop Committee's discussion regarding the development of a marketing strategy for the One Stop San Francisco system. Local One Stop Operator/s, One Stop partners, and One Stop Access Point agencies would use this strategy as a guideline for marketing and public relations activities. Intended to broadly define local policy regarding the One Stop San Francisco identity, the marketing strategy should also insure that there is a clear and consistent understanding of how the One Stop system is represented. The ultimate goal is to create an identity for One Stop San Francisco that communicates the system's role as the unifying link to local workforce development resources for employers and jobseekers.

FINDINGS

As a starting point, the Marketing Workgroup reviewed existing marketing materials developed within the local One Stop system as well as from other One Stop systems. Unlike the packets that we reviewed from other One Stop systems, One Stop San Francisco has no marketing materials that are representative of a system. Instead, there are materials that market the services available at individual Career Link Centers or through One Stop partner agencies. According to staff, past attempts to implement a coordinated marketing plan for the system have failed mainly due to inadequate funding. Consequently, there seems to be a general lack of awareness about the local One Stop system. Even partner staff delivering services at the One Stop Centers have an inconsistent understanding about the identity of the One Stop.

Multiple names, which include One Stop San Francisco, Career Link Centers, and One Stop Access Points, have contributed to confusion about the One Stop identity. The existing One Stop San Francisco logo, developed with early grant funding, is not used universally, nor does it show any connection to the Career Link Centers. The jobseeker and employer customers who access our services are usually unaware that they are being served through the local One Stop system.

There are no existing guidelines or templates for marketing materials being developed at the One Stop Centers and Access Points. The full service Center and the two satellite Centers each develop informational materials specific to their own sites and services. Generally, staff providing services at the Centers are not identified by badges or nametags as One Stop staff. Partner agencies market their own employment-related events without any reference to the One Stop system. There are no marketing materials to support referrals to or from the Access Point agencies. The One Stop San Francisco web site, which is intended to be a viable self-service portal to the system, has obsolete, inaccurate, and incomplete content.

CONCLUSIONS

Though significant progress has been made to expand outreach activities at the full service Center, marketing the entire system remains limited and fragmented. Since narrowing the focus on compliance at the Center, many system issues (including marketing) were set aside. There is clearly a need for guidance and consistent policies around marketing and public relations for each component of the system, as an integral part of that larger system.

Through effective marketing and increased awareness of the One Stop system, we would ensure that customers receive accurate information and have clear expectations about our services no matter where they enter the system, whether through a partner, at a Center, or through electronic access. The One Stop partners are clearly committed to the collaborative delivery of services and compliance achievement for the Center. By expanding that commitment to a coordinated and integrated marketing effort, One Stop San Francisco and all its partners begin to build the branding of One Stop San Francisco, essential to the goal of communicating to the community the unifying role of the One Stop system.

RECOMMENDATIONS

The Marketing Workgroup submits the recommendations for your consideration:

- It is recommended that the One Stop Committee adopt a marketing strategy that would establish basic marketing standards for system-wide application. This strategy should articulate the Workforce Investment Board's vision for how the local One Stop system will be represented by each of its partners.
- It is further recommended that the One Stop Committee consider the following potential actions that would:
 - Commission the development of a marketing plan related to all public relations, outreach, and recruitment within the One Stop San Francisco system. The marketing plan will include brand development, marketing collateral, advertising, direct mail materials, and promotional events.
 - Request the designation of a lead staff person to oversee the implementation of the marketing plan and to serve as the public information officer for One Stop San Francisco.
 - Support the development of budget recommendations that will adequately fund the implementation of a marketing plan for the One Stop San Francisco system.
 - Designate the One Stop Marketing Workgroup as an advisory body for the marketing policies of One Stop San Francisco. It is further recommended that in this advisory capacity, this Workgroup will explore the use of leveraged partner resources, corporate expertise, and other creative and cost-effective marketing solutions.
 - Encourage the local One Stop Operator/s and One Stop partners to work collaboratively to both participate in the development and implementation of the marketing plan for the system, as identified in the One Stop MOUs.

To this end, the Marketing Workgroup invites all interested parties to participate in the Workgroup activities as we move forward. Please direct your questions and comments to Cathy deCristofaro at 415-923-4268 or by email to cathy@picsf.org.

cc: Committee Chairs
PIC Sr. Staff

WORKFORCE INVESTMENT SAN FRANCISCO

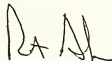
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: ROSALIE BULACH
CHAIR, ONE STOP COMMITTEE

DATE: MARCH 22, 2002

FROM: TECHNOLOGY WORKGROUP



SUBJECT: RECOMMENDATIONS FOR THE ONE STOP TECHNOLOGY PROJECT

As the Technology Workgroup for the One Stop Committee, we submit for Committee approval the following recommendations to support the advancement of the Technology Project for the local One Stop system. Our immediate goal is to identify a starting point so that staff can begin the work of developing the system intended to meet the technical needs of the One Stop San Francisco.

BACKGROUND

Past efforts to develop the technology infrastructure for the local One Stop system have been met with many challenges. Beginning in 1998, the State awarded to One Stop San Francisco a Technology Grant to put into operation their proposed technology plan. At the time, the goal was to create a system that would electronically link the various agencies and allow them to share and exchange information while providing universal access to the widest possible range of customers.

To this end, the grant was used to equip over twenty-five Access Point agencies and One Stop staff with fully installed computer systems and Internet access. The grant also funded the initial development of the One Stop web site, www.onestopsf.org, as well computer training for One Stop and Access Point staff. Though many objectives were accomplished through the grant, the greatest challenge proved to be providing ongoing support for the system that was developed. That ongoing support, which included permanent IT staff, equipment maintenance and upgrades, and website maintenance, was not covered by existing resources. Within a short period of time, the technology that was deployed had become outdated. Finally, unresolved issues concerning privacy and client confidentiality prevented the system from fully realizing the initial goals.

CURRENT STATUS

At the November meeting of the One Stop Committee of the WISF Board, staff presented an overview of the proposed Technology Project, intended to launch a corporate challenge from the Board to generate private sector funding for the project. The broad scope of the project and its objectives were presented to the Committee to both inform their discussion and to engage potential funders. Later in December 2001, the Committee reviewed and approved the One Stop Memoranda of Understanding,

which states that a primary responsibility of the WISF Board will be to collaborate with the One Stop Operator Consortium in developing and maintaining the system's technology infrastructure.

RECOMMENDATIONS

Given the ambitious scope the project, the Technology Workgroup is recommending the following steps to stimulate movement toward the achievement of the Technology Project goals and objectives:

- Emma Perez, Technology Systems Administrator for the Private Industry Council designated as the project manager of the system development and implementation element of the Technology Project.
- the One Stop Consortium identify a representative for participation on the Technology Workgroup
- the eMae case management / client tracking system be designated for use by the One Stop San Francisco system
- a swipe card or other technology be developed to record and report One Stop system customer characteristics, service levels, and Center use, that satisfies both internal management and State reporting requirements.

Staff will be available at the meeting to address your questions and concerns.

cc: Committee Chairs
PIC Sr. Staff

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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DRAFT MINUTES FOR THE 27 MARCH 2002 MEETING OF THE ONE STOP COMMITTEE OF THE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD

APR 19 2002

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COMMITTEE MEMBERS PRESENT:

William Allen, Rosalie Bulach, James Buick, Nicholas de Lorenzo, E. David Ellington, Phyllis McGuire, Craig Newmark, John Poremba, Victor Revenko (arrived at 1:10 P.M.), and Darlene Rutkowski.

COMMITTEE MEMBERS ABSENT:

Kathye Citron, Craig King, and Tamara Osheroff.

STAFF PRESENT:

Cathy deCristofaro, Karen Hart, Daphne Kay, Roy Li, Emma Perez, and Robert Schwab.

GUESTS (AS EVIDENCED ON THE SIGN-IN SHEET):

Elizabeth Echols, Devra Edelman, Larry Fleming, Bernard Leung, M. McDonald, Muriel O'Connell, and Jim Whelly.

Chair Bulach called the Meeting to order at 1:06 P.M. with a quorum established.

Motion to adopt the Agenda.

Moved by Nicholas de Lorenzo and seconded by James Buick.

Ayes: William Allen, James Buick, Nicholas de Lorenzo, E. David Ellington, Phyllis McGuire, Craig Newmark, John Poremba, and Darlene Rutkowski.

Nays: None.

Abstentions: None.

Motion passed.

Motion for adoption of the January 30, 2002 Minutes.

Moved by Craig Newmark and seconded by Darlene Rutkowski.

Ayes: William Allen, James Buick, Nicholas de Lorenzo, E. David Ellington, Phyllis McGuire, Craig Newmark, John Poremba, and Darlene Rutkowski.

Nays: None.

Abstentions: None.

Motion passed.

Chair Bulach asked if there was any public testimony on the agenda items. There was none.

Presentations

WIA & One Stop Overview

Robert Schwab gave an overview of the Workforce Investment Act and the One Stop System in a contextual perspective. The One Stop Center is "designed to provide a full menu of job training education and employment services at a single measurable location where the job seekers and employers will receive skill assessment services, information on employment and training opportunities, unemployment services, job search and placement systems, and up-to-date information on job agencies, all tailored to meet the community's need for service." The

Workforce Investment Act is "built on three main goals: improving the quality of the workforce; enhancing the productivity and competitiveness of the nation; and reducing welfare." One noticeable difference between the JTPA and WIA legislation is that the WIA legislation gave more authority to the Workforce Investment San Francisco Board than to the former Private Industry Council. The next presentation will focus on the One Stop System itself.

Chair Bulach questioned how many of the MOUs were signed and returned. Cathy deCristofaro replied that there were only a few that were returned. There was discussion about why the MOUs were not signed and whether or not there should be consequences for those One Stop partners who have not responded. As a result of the discussion, the Committee requested that staff submit a status report to the Chair by April 2nd before any decision regarding punitive action will be determined.

One Stop San Francisco System

Using visual aids that illustrated key points to the Committee, Cathy deCristofaro gave an overview of the One Stop San Francisco System. The overview included the history of the development of the local system, past and present governance structures, One Stop Centers and Access Points, and information about ongoing activities.

Operator Consortium

James Buick presented an update of the One Stop Operator Consortium. Mr. Buick reminded the Committee that the One Stop Career Center Operator is located at 3120 Mission Street and that the Consortium members consist of DHS, EDD, CCSF, NCOA, and PIC. He reviewed the Memorandum of Understanding between the Board and the Consortium. He also reviewed some of the responsibilities of the Consortium. They are:

1. "Ensuring, at a minimum, provision of core/universal services, availability of intensive services, and access to training services;
2. Assuring the integrated participation of the partner agencies;
3. Establishing common systems and procedures at the Center;
4. Assuring cross-training and capacity building for all partners;
5. Assisting with the development of established performance outcomes;
6. Recommending policy changes to the WISF Board;
7. Assuring accountability to the WISF Board for terms of the One Stop Operator Consortium/WISF Board agreement;
8. Oversight of the MOUs on behalf of the WISF Board;
9. Providing recommendations for the Center funding to the WISF Board;
10. Managing the Center budget;
11. Convening the partners to implement a continuous improvement process for service delivery in the Center;
12. Coordinating seamless service delivery;
13. Implementing a coordinated employer and universal job seeker outreach and marketing effort as provided by available funds;
14. Recommending a design/delivery system for employer/business services, including gathering input from the business community and clarification about how such services will be accessed;
15. With the WISF Board, developing and maintaining the system's technology links;
16. Determining how all the entities who participates in the Full Service One Stop Center can be involved in the discussion and decision making for the operation and delivery of services at 3120 Mission Street;

17. Striving to inform and solicit input from all participating Center partners; and
18. Ensuring that reasonable efforts will be made to insure the safety and security of all customers and staff. "

Mr. Buick also informed the Committee that the Consortium will govern themselves through the Governance Agreement. The Consortium has three subcommittees: Consortium Directors Committee, Management Committee, and Center Operations Committee. The Consortium Directors Committee is a policy body that is "responsible for ensuring compliance with MOUs." Mr. Buick himself is the chair and contact person. Other members are Phyllis McGuire, John Poremba, Nicholas de Lorenzo, and Robert Schwab. The Management Committee "oversees implementation, compliance and financial plans." The chair is Tony Lugo and the other members are Greg Johnson, Lucy Scarbrough, Nicholas de Lorenzo, and Cathy deCristofaro. The Center Operations Committee "implements the service plan." The chair is Roy Li, the Center Manager, and the other members consist of representatives from DHS, EDD, NCOA, PIC, CCSF, State Department of Rehab, and Arriba Juntos that have signed the Participation Agreement. Mr. Buick finally gave the Committee an update of the customer traffic at 3120 Mission Street.

One Stop Committee Workgroup Reports

One Stop Marketing

Cathy deCristofaro presented an update of the group's activities and recommendations. The goal of this committee is to create an "identity for One Stop San Francisco that communicates the system's role as the unifying link to local workforce development resources for employers and job seekers." They plan to develop a marketing strategy that would be used by One Stop Operators, Partners, and Access Points as a "guideline for marketing and public relations." This strategy should ensure that there is a "clear and consistent understanding of how the One Stop San Francisco is represented." The recommendations are as follows:

1. One Stop Committee to adopt a marketing strategy that would establish basic marketing standards for system-wide application. This strategy should articulate the Workforce Investment Board's vision for how the local One Stop system will be represented by each of its partners.
2. It is further recommended that the One Stop Committee consider the following potential actions that would:
 - a. Commission the development of a marketing plan related to all public relations, outreach, and recruitment within the One Stop San Francisco system. The marketing plan will include brand development, marketing collateral, advertising, direct mail materials, and promotional events.
 - b. Request the designation of a lead staff person to oversee the implementation of the marketing plan and to serve as the public information officer for One Stop San Francisco.
 - c. Support the development of budget recommendations that will adequately fund the implementation of a marketing plan for the One Stop San Francisco system.
 - d. Designate the One Stop Marketing Workgroup as an advisory body for the marketing policies of One Stop San Francisco. It is further recommended that in this advisory capacity, this Workgroup will explore the use of leveraged partner resources, corporate expertise, and other creative and cost-effective marketing solutions.

- e. Encourage the local One Stop Operator/s and One Stop partners to work collaboratively to both participate in the development and implementation of the marketing plan for the system, as identified in the One Stop MOUs.

Motion to authorize the Marketing Workgroup to develop a marketing strategy for the One Stop San Francisco system.

Moved by Nicholas de Lorenzo and seconded by Victor Revenko.

Ayes: William Allen, James Buick, Nicholas de Lorenzo, E. David Ellington, Phyllis McGuire, Craig Newmark, John Poremba, Victor Revenko, and Darlene Rutkowski.

Nays: None.

Abstentions: None.

Motion passed.

One Stop Technology

Craig Newmark, the chair of this workgroup, presented an update of the group's activities and recommendations. Their immediate goal is to "identify a starting point so staff may begin the work of developing the system intended to meet the technical needs of the One Stop San Francisco." Mr. Newmark reminded the Committee that the staff presented an overview of the Technology Project in November 2001. The project intends to launch a corporate challenge from the Board to generate private sector funding for the project. The recommendations to stimulate movement toward the achievement of the Technology Project goals and objectives are as follows:

1. Emma Perez, Technology Systems Administrator for the Private Industry Council, designated as the project manager of the system development and implementation element of the Technology Project.
2. The One Stop Consortium identify a representative for participation on the Technology Workgroup
3. The eMae case management/client tracking system be designated for use by the One Stop San Francisco system
4. A swipe card or other technology be developed to record and report One Stop system customer characteristics, service levels, and Center use, that satisfies both internal management and State reporting requirements.

Motion to approve the above recommendations.

Moved by Craig Newmark and seconded by Nicholas de Lorenzo.

Ayes: William Allen, James Buick, Nicholas de Lorenzo, E. David Ellington, Phyllis McGuire, Craig Newmark, John Poremba, Victor Revenko, and Darlene Rutkowski.

Nays: None.

Abstentions: None.

Motion passed.

Darlene Rutkowski reported on the Accessibility Workgroup. She handed out a white paper by Access Ingenuity, titled "Universal Access for One Stops in California."

Because of time limitations, the item, "Next Steps for Committee Workgroups," was to be carried over to the next meeting agenda.

The Meeting was adjourned at 3:00 P.M.

Workforce Investment San Francisco

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING

OF THE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD

ONE STOP COMMITTEE

Date: Wednesday, April 24, 2002
Time: 1:00 P.M. – 3:00 P.M.
Location: SF Community College District Office
Auditorium
33 Gough Street
San Francisco, CA 94103

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Issued: April 16, 2002

Proposed Agenda

1. Adoption of the Agenda (*Action Item*)
2. Approval of the Minutes for March 27, 2002 (*Action Item*)*
3. Public Testimony on Agenda Items (*Discussion Item*)
4. One Stop Committee Workgroups –
 - Report - One Stop Technology Workgroup (*Information Item*)
 - Report - One Stop Marketing Workgroup (*Discussion Item*)
 - Next Steps for Workgroups (*Discussion Item*)
5. Conceptual Budget for One Stop San Francisco System (*Discussion Item*)**
6. Public Testimony on Non-Agenda Items
7. Future Agenda Items (*Discussion Item*)
8. Adjournment (*Action Item*)

*Information enclosed.

**Information materials to be mailed.

Workforce Investment San Francisco

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING OF THE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD ONE STOP COMMITTEE

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MAY 17 2002

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Date: Wednesday, May 22, 2002
Time: 1:00 P.M. – 3:00 P.M.
Location: Community College District Office
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415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

Copies of the Sunshine Ordinance can be obtained at the San Francisco Public Library online at the City's Web site at www.ci.sf.ca.us/infoctr/sunshine/index.htm

OTHER ACCOMMODATIONS

In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.

Issued: May 15, 2002

PROPOSED AGENDA

1. Adoption of the Agenda (*Action Item*)
2. Approval of the Minutes for the meetings held on March 27, 2002 and April 24, 2002 (*Action Item*)*
3. Public Testimony on Agenda Items (*Discussion Item*)
4. Report – "Welcome to the One Stop" training (*Information Item*)
5. Report - One Stop Technology Workgroup (*Information Item*)*
6. PY' 2002 WIA Allocations and Proposed Strategic Budget (*Action Item*)*
7. Public Testimony on Non-Agenda Items
8. Future Agenda Items (*Discussion Item*)
9. Adjournment (*Action Item*)

*Information enclosed

**Information to be sent

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: ONE STOP COMMITTEE **DATE:** MAY 14, 2002

FROM: ONE STOP TECHNOLOGY WORKGROUP

SUBJECT: ONE STOP SWIPE CARD-TRACKING SYSTEM SELECTION CRITERIA
(AGENDA ITEM 5)

In order to facilitate a clearer decision-making process for the acquisition and implementation of an electronic mechanism for the collection and reporting of One Stop client data, the Technology Workgroup proposes dividing this mechanism into two components. The first component, the Client Tracking System, would automate the capturing of client characteristics and volume of services provided at the three physical One Stop Centers through a card swipe system. The second component, the in-depth Case Management System, would automate the case management function, integrating the swipe card client data and providing data sharing capabilities to the entire One Stop System, including physical Centers, satellite sites and Partner staff.

At this time, it is the intent of the Workgroup to address the immediate needs for data collection at the One Stop Centers. The Technology Workgroup has developed criteria for the selection of the Client Tracking System, the first component. Once the first component is identified and implemented, selection criteria will be developed for the second component.

The following criteria should help the One Stop Committee make a determination.

1. Does the proposed system do the job? Is it fully functional in its current state or does it need customization?
2. What is the cost of the entire system? Are there annual/site/user licensing costs?
3. Will it be compatible with the One Stop Case Management System? Does it support database integration?
4. What is the stability of the vendor? Will they provide upgrades, revisions, and maintenance support? Subsets of this criterion are (a) how long have they been in business, (b) do they have a help desk, (c) how many employees make up the organization, (d) do they provide the source code for the system.
5. What is the implementation timeline, specifically for 3120 Mission?
6. Does the system have "buy-in" from key staff/Partners?

The Technology Workgroup proposes evaluating the following two vendors for a Client Tracking System: Bartizan Data Systems and Winsor & Associates.

CRITERIA	BARTIZAN DATA SYSTEMS*	WINSOR & ASSOCIATES*
1. Current Functionality		
2. Cost		
3. Compatibility		
4. Stability of Vendor		
5. Implementation Timeline		
6. Buy-In		

* Information will be provided during the meeting.

Based on the selection criteria and comparison information provided, the selection process should be facilitated for the One Stop Committee.

Should you have any questions or concerns about the information provided, please feel free to contact Emma Perez, at eperez@picsf.org or 415.923.4267.



PRIVATE INDUSTRY COUNCIL
of San Francisco, Inc.

*creating
employment
opportunities*

MEMORANDUM

TO: ONE STOP COMMITTEE, **DATE:** MAY 15, 2002
WORKFORCE INVESTMENT SAN FRANCISCO BOARD
MAYOR'S STAFF

FROM: PAMELA S. CALLOWAY, PRESIDENT

SUBJECT: PY'2002 WORKFORCE INVESTMENT ACT (WIA) ALLOCATIONS AND
PROPOSED STRATEGIC BUDGET (AGENDA ITEM 6)

At the April 24, 2002 meeting, the One Stop Committee was presented with information intended to inform the upcoming Committee recommendation concerning the distribution of Workforce Investment Act (WIA) funds for Program Year (PY') 2002. As requested by the Committee, staff has subsequently prepared additional supporting documentation and budget detail. Attached please find the following information:

- WIA Funding Budgeted for PY' 2001-2002 with PY' 2002-2003 scenarios
- WIA Adult Subcontractor Performance Report
- WIA Expenditure Report – 3120 Mission PY' 2001-2002
- Career Link Center Mission - Updated Compliance Plan
- One Stop San Francisco Projected Baseline System Budget PY' 2002-2003

Additionally, the One Stop Committee Chair has requested that the budget projections show a line item in the amount of \$500,000, to be allocated for the development and support of System Technology for One Stop San Francisco.

BACKGROUND

WIA allocations for San Francisco were released by the State on March 26, 2002, as detailed below.

	<u>Adult</u>	<u>Dislocated Worker</u>	<u>Youth</u>	<u>Total</u>
PY'2001 (current year)	1,908,004	1,952,323	1,864,040	5,724,367
PY'2002 (upcoming year)	<u>2,012,692</u>	<u>2,357,226</u>	<u>1,841,278</u>	<u>6,211,196</u>
Differences	104,688	404,903	(22,762)	486,829

As stated in the by-laws for the Workforce Investment San Francisco (WISF) Board, the One Stop Committee shall be the planning committee of One Stop San Francisco (OSSF), the local One Stop System. Additionally, this committee shall monitor operations of OSSF and prepare recommendations for the Executive Committee and the WISF Board concerning the allocation of scarce resources to and between: operation of facilities (centers and satellite locations); operation of systems (technology, personnel staffing and training); and operation of job-seeker training (cost reimbursement contracts and/or individual referral contracts).

The immediate task of the One Stop Committee is to initiate the development of a *strategic* budget, dividing each WIA funding stream into percentage shares for *administration*, for *system building and support*, and for *training*. The One Stop Committee's recommendation will advance to the Executive Committee and to the WISF Board for action. Subsequent to the allocation of those resources, the One Stop Committee, the Program Resources Committee, and the Youth Council share responsibility for budgeting the WIA Adult, Dislocated Worker and Youth funds.

Providing that the One Stop Committee's recommendation for the strategic division of WIA resources is accepted, the following activities will then occur:

- *Adult* allocation: The Program Resources Committee distributes the *training* dollars among effective community-based subcontracts to serve low income San Franciscans with multiple barriers to employment;
- *Dislocated Worker* allocation: The PIC, Inc. staff distributes the *training* dollars by completing individual assessments of the skills and interests of laid-off workers and developing personalized *Individual Referral* (IR) training subcontracts with agencies listed on the State-certified Eligible Training Providers List (ETPL); and
- *Youth* allocation: The Youth Council distributes the *training* dollars in a fashion similar to the Program Investment Committee's action for Adults (above) but with a youth focus and a minimum requirement for expenditures on those who are out-of-school.

EXPLAINING THE STRATEGIC BUDGETING PROCESS

For last year's allocation, a strategic budget was adopted in May of 2001 which provided for —

- 10% of each allocation was reserved for the administrative expenses of the system, as provided by the Act and its Interim Final Rule;
- 25% of each allocation was reserved for "One Stop building and support." Of that 25%, 15% was reserved for operational and management aspects of the WIA Adult, Dislocated Worker, and Youth programs; and 10% was reserved to bring the full-service One Stop Center (3120 Mission) into compliance with the Workforce Investment Act. Concerning the latter 10% portion of the allocation, it was further recommended that any funds not needed for compliance would be returned to the training pool for subcontracts
- 65% of each allocation was reserved for the training of individuals targeted by the intent of the Act (for Adult and Youth funds, training for low-income San Franciscans, and for Dislocated Workers, training for workers laid off from jobs in San Francisco).

The actual PY'2001 (current year) strategic budget is as follows:

Actual PY'2001 WIA Budgets		Adult Programs	Youth Programs	Dis.. Wkr. Programs	All Programs
Revenue: PY'2001 Allocations		1,908,004	1,807,547	1,952,323	5,667,874
Expense: PIC Administration	10%	190,800	180,755	195,232	566,787
One Stop Building & Support	25%	477,001	451,887	488,081	1,416,969
Training (Subk. & Support Pools)	65%	1,240,203	1,174,906	1,269,010	3,684,119
###		1,908,004	1,807,548	1,952,323	5,667,875

For your review and discussion, staff presents to you the following alternate scenarios for the upcoming PY'2002, based on the recent allocations. This year, we have also split the funding category previously referred to as "One Stop building and support" into two sub-categories: "Program Operations and Management" and "OSSF Support."

"Program Operations and Management" funds cover the cost of activities that include but are not limited to the administration of WIA training contracts, the maintenance and dissemination of the State-certified Eligible Training Provider List, data collection and reporting, grant management, program planning, compliance monitoring, staff development, and support for the WISF Board.

"One Stop System Support" costs includes the portion of the overall cost for operations and continuous improvement of the One Stop service delivery system that is not currently covered by the One Stop partners. These costs include but are not limited to facilities and staff, ADA accommodations, staff development, marketing and public relations, and IT support. Currently, the One Stop partners contribute significantly to the delivery of services at the full service Center and the satellite sites. However, ongoing funding to augment their contribution will be critical to support and sustain compliance at the Center while more fully integrating the satellite sites into the service delivery network.

- **Scenario #1** reserves 10% of the new WIA funds for administrative expense, and of the balance, directs 15% to manage and operate WIA Adult, Dislocated Worker, and Youth programs; directs 10% to One Stop system-building and support; and directs the remaining 65% to training programs and a supportive service pool for child care, transportation, etc. (This is the same strategic distribution as the current year.)

Scenario #1 PY'2002 WIA Budgets		Adult	Youth	Disloc. Wkr.	All Programs
Revenue: PY'2002 Allocations		2,012,692	1,841,278	2,357,226	6,211,196
Expense: PIC Administration	10%	201,269	184,128	235,723	621,120
Program operations & management	15%	301,903	276,192	370,585	931,680
One Stop System Support	10%	201,269	184,128	235,723	621,120
Training (Subk. & Support Pools)	65%	1,308,251	1,196,830	1,515,195	4,037,276
###		2,012,692	1,841,278	2,357,226	6,211,196

- **Scenario #2** reserves 10% for Admin and of the balance, directs 15% to manage and operate WIA Adult, Dislocated worker, and Youth programs; directs 15% to One Stop system-building and support; and directs the remaining 60% to training programs and a supportive service pool for child care, transportation, etc.

Scenario #2 PY'2002 WIA Budgets		Adult	Youth	Disloc. Wkr.	All Programs
Revenue: PY'2002 Allocations		2,012,692	1,841,278	2,357,226	6,211,196
Expense: PIC Administration	10%	201,269	184,128	235,723	621,120
Program operations & management	15%	301,903	276,192	370,585	931,680
One Stop System Support	15%	301,903	276,192	370,585	931,680
Training (Subk. & Support Pools)	60%	1,207,617	1,104,766	1,380,333	3,726,716
###		2,012,692	1,841,278	2,357,226	6,211,196

CONSIDERATIONS

Staff submits the proposed scenarios and the following excerpts from San Francisco's *Strategic Five-Year Local Plan* to help inform the Committee's discussion and ultimately, their recommendation. Though the plan does not contain specific guidance for the budgeting of allocations, it does contain the following statements:

"The city's vision of the local workforce investment system is to integrate current services in the One Stop Centers and Access Points, to move toward providing universal access to career and labor market information, and to provide other useful consumer information regarding training and education that enables our customers to make better informed choices." (pp. 7).

"Each Career Center will have the full compliment of Core services and most, if not all Intensive Services. Each site will have the flexibility to configure and deliver services in a manner that best suite the local population....and will be promoted as 'business assistance centers.'" (pp.17)

"Individuals who, at the point of initial assessment, present multiple barriers to employment or are identified as strong candidates for Training Services will be moved directly into specialized assessment and linked with appropriate training services. It is our intention to have the transition from Core, to Intensive, to Training Services be immediate from the perspective of the client. (We do not want to have the client experience a failure-based system.)" (pp. 20).

Staff will be available at the meeting of the One Stop Committee on May 22nd to discuss these issues and attempt to answer any questions you may have.

cc: One Stop Partners
PIC staff

**Workforce Investment Act Funding
Budgeted for Year Ending June 30, 2002 (PY 01)**

	<u>Adult</u>	<u>Dislocated Worker</u>	<u>Youth</u>	<u>Total</u>	<u>Expenditure @ 3/31/02</u>	<u>PY 2002 10%</u>	<u>PY 2002 15%</u>
Administrative Cost							
Fiscal, Procurement,							
Personnel & Admin Staff	\$209,788	\$195,232	\$242,169	\$647,190	\$532,460	\$621,120	\$621,120
(Includes overhead cost-16.35%)							
Operation & Management Cost							
Contract Staff	138,820	107,287	180,388	426,496	293,846	290,929	290,929
Planning Staff	57,119	44,144	74,222	175,485	120,905	119,705	119,705
MIS Staff	87,952	67,974	114,288	270,214	186,171	184,323	184,323
One Stop Staff	95,028	73,443	123,483	291,954	201,150	199,153	199,153
STEP Staff	0	0	85,299	85,299	44,535	137,570	137,570
(Includes overhead cost-16.35%)							
One Stop System Support	378,919	292,848	577,681	1,249,448	846,606	931,679	931,679
One Stop System Capacity Bld.	190,800	178,796	186,404	556,000	551,903	621,120	931,679
	0	0	0	0	0	500,000	500,000
Training Cost							
Cost Reimbursement	1,028,624	0	1,179,322	2,207,946	1,081,067	1,680,780	1,533,214
On the Job Training	316,912	0	0	316,912	48,828	241,247	220,066
Individual Referrals	127,449	1,296,550	172,965	1,596,964	1,004,827	1,215,676	1,108,944
Supportive Services	145,395	345,030	34,473	524,898	315,048	399,574	364,493
	1,618,380	1,641,580	1,386,760	4,646,720	2,449,771	3,537,277	3,226,718
Total	\$2,397,887	\$2,308,457	\$2,393,014	\$7,093,358	\$ 4,380,740	\$6,211,196	\$ 6,211,196

Expenditures for PY 01

Prior year carryover (PY 00)

	<u>Annual Planned @ 3/02</u>	<u>Actual @ 3/02</u>	<u>Annual Planned @ 3/02</u>	<u>Actual @ 3/02</u>	<u>Annual Planned @ 3/02</u>	<u>Actual @ 3/02</u>
Participant Served	251	257	N/A	311	242	212
Active Participant	N/A	184	N/A	207	N/A	203
Participant Exited	91	73	N/A	104	17	9
Participant Placed	107	73	N/A	93	23	9
Participant Average Wage	\$ 7.52	\$ 11.77	N/A	\$ 10.75	N/A	\$ 9.63
					N/A	\$ 10.72

Workforce Investment Act Adult Subcontractors
 Nine Months Performance: July 1, 2001 - March 31, 2002

Subcontractors	Budget & Expenditures		%	Enrollments		Placements			Placements Rates		Average Wage			
	Plan	Actual		Plan	Actual	%	Plan	Actual	# Exits	# Placements	%	Plan	Actual	
Computer Skills														
Goodwill Industries Inc.	\$18,168.00	\$5,768.00	32%	10	7	70%	5	1	20%	1	100%	\$7.00	\$12.55	
International Inst. of CAKCI	\$102,350.00	\$78,202.00	76%	18	28	156%	12	2	17%	4	2	50%	\$6.75	\$12.26
Mission Lang. & Voc. School	\$91,845.00	\$65,300.00	71%	28	29	104%	6	3	50%	9	3	33%	\$8.50	\$9.60
S.F. Vocational Services	\$52,959.00	\$51,435.00	97%	10	10	100%	2	0	0%	2	0	0%	\$7.00	\$0.00
Const./Cabinet Making														
Asian Neighborhood Design	\$67,671.00	\$59,316.00	88%	22	24	109%	10	4	40%	8	4	50%	\$7.00	\$17.40
Young Community Developers	\$65,666.00	\$50,686.00	77%	11	11	100%	11	9	82%	11	9	82%	\$7.00	\$17.31
Food Service														
Elia Hill Hutch Community Ctr.	\$43,375.00	\$27,815.00	64%	8	3	38%	0	0	0%	0	0	0%	\$7.00	\$0.00
Haight Ashbury Food Program	\$48,323.00	\$33,794.00	70%	6	7	117%	1	1	100%	2	1	50%	\$9.00	\$8.00
Health Careers														
Arriba Juniors	\$100,266.00	\$61,534.00	61%	24	23	96%	11	15	136%	15	15	100%	\$8.00	\$17.57
Self Help for the Elderly	\$34,652.00	\$25,733.00	74%	8	8	100%	2	2	100%	2	2	100%	\$9.00	\$9.70
Housekeeping														
Self Help for the Elderly	\$156,401.00	\$121,308.00	78%	42	42	100%	14	18	129%	18	18	100%	\$7.00	\$8.20
Job Readiness														
The Family School	\$51,618.00	\$28,815.00	56%	10	11	110%	6	1	17%	1	1	100%	\$7.00	\$9.00
On-the-Job Training														
Arriba Juniors	\$86,307.00	\$50,532.00	59%	19	24	126%	6	8	133%	8	8	100%	\$8.00	\$10.07
Jewish Vocational Service	\$26,544.00	\$15,230.00	57%	5	4	80%	1	1	100%	1	1	100%	\$8.00	\$10.00
No. California Service League	\$88,068.00	\$47,873.00	54%	16	19	119%	9	5	56%	5	5	100%	\$7.00	\$11.55
Swords to Plowshares	\$66,791.00	\$32,439.00	49%	14	7	50%	11	3	27%	4	3	75%	\$7.00	\$11.67
Totals	\$1,101,004.00	\$755,780.00	69%	251	257	102%	107	73	68%	91	73	80%		

9/27/01 ERM

PENNSACANT

SF ONE STOP OPERATOR CONSORTIUM
WORKFORCE INVESTMENT ACT (WIA)
BUDGET EXPENDITURES REPORT 2001-2002

Item	Budgeted Cost	Procured Expenses 6/1/02-4/30/02	Projected Expenses 5/1/02-6/30/02	BALANCE
OPERATION COST				
Equipments, softwares, swipe card, opinion meter, other equipments	\$ 91,000.00	\$ 84,100.00	\$ 20,750.00	\$ (13,850.00)
PERSONNEL				
5 Center Staff	\$ 145,000.00	\$ 77,000.00	\$ 39,000.00	\$ 29,000.00
STAFF DEV. ACTIVITIES				
CWA Conference	\$ 20,000.00	\$ 5,952.39		\$ 14,047.61
COST RELATED TO SHARED SPACE				
Annual rent for shared space, Lifeprint furnitures & books, Center signage, handicap parking, accordion, workstations, door lock combo	\$ 263,000.00	\$ 242,600.61	\$ 33,000.00	\$ (12,600.61)
EQUIPMENT				
Computers, printers, electrical wiring	\$ 37,000.00	\$ 39,500.00	\$ 10,000.00	\$ (12,500.00)
3. PC's for New Lab in Room 3 (12 each)				
TOTAL	\$ 556,000.00	449,153.00	102,750.00	4,097.00
Total Budgeted Cost	\$ 556,000.00			
Total Procured Expenditure	\$ 449,153.00	81%		
Total Projected Expenditures	\$ 102,750.00	1%		
ESTIMATED BALANCE	\$ 4,097.00			
Index Code 450046, project PSSVOC.				
Use subobject 04921 for data processing equipment worth 5,000 each. 04951 for "other office supplies."				

COMPLIANCE PLAN UPDATE 2002

Career Link Center - Mission - 3120 Mission Street

Required Services and Definitions	Recommended Action	Completed	Work-in-Progress	Estimated Work-in-Progress Completion Date	Required Services' Projected Date of Implementation
<p>Eligibility Determination Determination of whether individuals are eligible for WIA Title 1B</p>		<p>Eligibility Determination Information for eligibility determination for EDD, Food Stamps, Medi-Cal, Calworks, WIA Title 1 dislocated worker, and other Title 1 services are in place</p>	<p>Eligibility Determination Staff to provide eligibility determination of WIA Title 1 is being implemented by PIC</p>	5/31/02	5/31/02
<p>Outreach Activities to encourage & enable customer access to services Provided to universal population</p>	<p>Establish Phone Information system for Career Link Center</p> <ul style="list-style-type: none"> One point of contact for Center and System Information Multilevel recording and router system <ul style="list-style-type: none"> Comprehensive information about the Center, services, locations, hours, Salaries & Access Points, web site, transportation, etc. Center reception and staff lines with voicemail Phones for restricted customer use relating to job search Package includes phones and fax machine <p>Using in phonebook yellow pages and other directories</p>	<p>Outreach</p> <ul style="list-style-type: none"> A main phone number used as a main point of contact for the Center has been installed (415-401-4800). The recording and voicemail system is in operation The Career Link Center - Mission's external signage for both 3120 and 3119 Mission buildings has been installed Existing trees covering the front signs of the Center have been trimmed Completed Yellow page, 411 for September 2002 telephone book listings Information on Thursday extended hours have been distributed to partners, agencies, CBOs 	<p>Outreach</p> <ul style="list-style-type: none"> The Orientation System for clients (staff provided and self-assisted) is being prepared for implementation The marketing brochures for the Center (information folder and multi-fold brochure) is in process of being put together by the Operations Committee The internal signage (list of services and partners co-located at the Center) is being developed by the Operations Committee 	6/30/02 6/30/02 6/30/02	6/30/02

COMPLIANCE PLAN UPDATE 2002 **Career Link Center - Mission - 3120 Mission Street**

Required Services and Definitions	Recommended Action	Completed	Work-in-Progress	Estimated Work-in-Progress Completion Date	Required Services' Projected Date of Implementation
<p>Intake</p> <p>Initial basic information which is commonly solicited by all program managers and all required activities up to the determination of eligibility provided to universal population</p>	<ul style="list-style-type: none"> • Develop and integrate Power Point Orientation • State-of-the-art presentation with digital images • For use by Center & System • For customer and staff orientation to the Center • For use by satellite sites and employers • Develop and distribute marketing materials • Center-specific brochures and workshop flyers • Event-specific, Job fairs, forums, etc.) materials • Advertisements • Integration into partner publicly networks • Update and market One Stop Web site 	<p>Intake</p> <ul style="list-style-type: none"> • Basic information is being collected from clients • The customer database is in place • Customer traffic data is being collected • Completed design of Intake form 	<p>Intake</p> <ul style="list-style-type: none"> • The Director Committee is discussing the purchase of the swipe card data collection system 	TBD	TBD
<p>Orientation</p> <p>Information to the customers on partner programs, the One Stop System and Center services provided to universal population</p>		<p>Orientation</p> <p>A process to provide orientation by the Center Manager is available on request</p>	<p>Orientation</p> <p>Orientation System for clients (staff provided and self-assisted orientation) is being worked on by the Operations Committee</p>	6/30/02	6/30/02

Under the Completed column, text in GREEN are new items

COMPLIANCE PLAN UPDATE 2002 **Career Link Center - Mission - 3120 Mission Street**

Required Services and Definitions	Recommended Action	Completed	Work-in-Progress	Estimated Work-in-Progress Completion Date	Required Services' Projected Date of Implementation
<p>Universal Access</p> <ul style="list-style-type: none"> Accessibility to the widest range of customers to information about services relating to their career, employment, training, and educational goals 	<ul style="list-style-type: none"> Development of Career Link web page that lives on OSSF site, maintained by Center staff Modifications and enhancements to existing site Staff training for site use and maintenance Develop potential for communicating and posting info 	<p>Universal Access</p> <ul style="list-style-type: none"> ADA compliant automatic entrance door, staff and public restrooms have been installed in place ADA computer and software are in place Handicapped parking (two for customers) has been leased Lobby phones with volume control and TTY phone for filling Unemployment Insurance have been installed DCARA staff to assist deaf and mute clients are operating onsite Multilingual staff is available onsite Staff qualified to assist various populations such as veterans, police-to-work offenders, low English proficiency are available onsite 	<p>Additional improvements are being planned with input from One Stop Accessibility Committee</p>	<p>On going</p>	
<p>Initial Assessment</p> <p>Determination of the customer's skill levels, aptitudes, and supportive services needs</p> <p>Provided to universal population</p>	<p>STAFF- Universal Client Rep-1 FTE</p> <ul style="list-style-type: none"> Provides one-on-one assistance to drop-in customers, including brief skill levels, aptitudes, and service to universal orientation to relevant services at the Center Supportive services needs Provides assessment of skill level, aptitudes, abilities & supportive Provided to universal population service 	<p>Initial Assessment</p> <ul style="list-style-type: none"> Workshops providing skill and aptitude assessments (e.g., PESCO, OWIZ, Reading Free, MOD C) are in place Job description and postings for the Universal Client Representative and the Information and Referral Specialist has been completed Completed hiring of the Universal Client Representative and the Information and Referral 	<p>Initial Assessment</p> <ul style="list-style-type: none"> Include Initial Assessment information in the Orientation System for clients (staff provided and self-assisted) Job Skills assessment software has been purchased and is being installed. 	<p>6/30/02</p> <p>6/30/02</p>	<p>6/30/02</p>

COMPLIANCE PLAN UPDATE 2002 **Career Link Center - Mission - 3120 Mission Street**

Required Services and Definitions	Recommended Action	Completed	Work-in-Progress	Estimated Work-in-Progress Completion Date	Required Services' Projected Date of Implementation
<p>Job Search, Job Placement, Counseling</p> <ul style="list-style-type: none"> • Job Search Provision of information and/or tools to help customers find a job • Job Placement Active staff involvement in directly connecting the job seeker to the employer • Counseling Staff provision of information and advice to a customer for the purpose of helping the customer make wise choices about education, training, and career 	<p>needs</p> <ul style="list-style-type: none"> • Refers customer to self-directed or staff-assisted core resources. Initiates intake process by entering client record in common case management system • Refers clients to Universal Client Representative, if needed • Initiates follow-up services <p>STAFF-UNIVERSAL CLIENT REPRESENTATIVE</p> <ul style="list-style-type: none"> • Supportive programs & services available through system tools to help customers find a job • Assists in development of common system-wide referral process • Also acts as librarian for the Resource Room 	<p>Job Search, Job Placement, Counseling</p> <ul style="list-style-type: none"> • Purchased Heplink directory for Center (10 online user licenses and 6 directories) • Job description and postings for the Universal Client Representative and the Information and Referral Specialist has been completed • A DHS Job Placement Specialist has been assigned • Drop-in Advisors and schedules are available on site • Monthly and daily Job Workshop Schedules are posted and distributed at the lobby • Career Counselors are available by appointment • Career exploration software such as Choices and Eureka are available • Library resource materials have been purchased 	<p>Job Search, Job Placement, Counseling</p> <ul style="list-style-type: none"> • Include job search, placement and counseling information in the Orientation System for clients • List services in marketing brochures and internal signage for List of Services • Setup of the library resource materials and identifying library resource staff is in process 	<p>6/30/02</p> <p>6/30/02</p> <p>6/29/02</p>	<p>6/30/02</p>

Under the Completed column, text in GREEN are new items

COMPLIANCE PLAN UPDATE 2002 **Career Link Center - Mission - 3120 Mission Street**

Required Services and Definitions	Recommended Action	Completed	Work-in-Progress	Estimated Work-in-Progress Completion Date	Required Services' Projected Date of Implementation
choices	<ul style="list-style-type: none"> Purchase and install career exploration resources Choices and Eureka programs 	<ul style="list-style-type: none"> Workshops such as Resume Writing, Interview, Choices, PESCO, Job search the Internet Way, Job Readiness Workshops and others are in place Computer with access to Caljobs and the Internet are available and onsite staff to assist with registration OCARA staff to assist deaf and mute clients are operating onsite Completed hiring of the Universal Client Representative and the Information and Referral Specialist 			
Labor Market information Provided to universal population	<ul style="list-style-type: none"> Labor Market Information Integrate into Orientation and Center Resources Signage and printed materials Train staff 	<ul style="list-style-type: none"> Labor Market Information is provided in the Jump Start Workshop, Steps Program/ Job Readiness Workshop in Spanish and Chinese Job description and postings for the Universal Client Representative has been completed Completed hiring of the Universal Client Representative 	<ul style="list-style-type: none"> Labor Market Information Include LMI service availability in the Orientation System for clients List services in marketing brochures and internal signage for List of Services 	<p>6/30/02</p> <p>6/30/02</p>	6/30/02
Information about local Training Programs - Performance and Cost	<ul style="list-style-type: none"> Integrate into Orientation and Center Resources Signage and printed materials Train staff 	<ul style="list-style-type: none"> Information about local Training Programs - Performance and Cost Performance indicators are provided by PIC to sub- 	<ul style="list-style-type: none"> Information about local Training Programs - Performance and Cost Include information on Local Training Programs in the Orientation System for clients 	6/30/02	6/30/02

COMPLIANCE PLAN UPDATE 2002
Career Link Center - Mission - 3120 Mission Street

Required Services and Definitions	Recommended Action	Completed	Work-in-Progress	Estimated Work-in-Progress Completion Date	Required Services' Projected Date of Implementation
<p>Information about local System Performance</p>	<ul style="list-style-type: none"> Integrate into Orientation and Center Resources Signage and printed materials Train staff 	<ul style="list-style-type: none"> contractors and others in the training community DHS CalWorks Program has performance data available for their employment specialist Job description and postings for the Universal Client Representative has been completed Information, fees and costs for CCSF programs are provided PICs Training program costs are available Training costs for the State Department of Rehabilitation (DOR) program are available through the DOR counselor Information about user employment training services available throughout the community is at the Center ETPL list is available in online version Completed hiring of the Universal Client 	<ul style="list-style-type: none"> List services in marketing brochures and internal signage for List of Services 	<p>6/30/02</p>	<p>6/30/02</p>
<p>Information about local System Performance</p>	<ul style="list-style-type: none"> Integrate into Orientation and Center Resources Signage and printed materials Train staff 	<p>Information about local System Performance</p> <ul style="list-style-type: none"> Local performance measures are available from PIC EDD and DHS sets program specific performance standards Job description and postings for the Universal Client Representative has been 	<p>Information about local System Performance</p> <ul style="list-style-type: none"> Include information on local system performance in the Orientation System for clients Inclusion in the internal signage for the List of Services is in process by the Operations Committee 	<p>6/30/02</p>	<p>6/30/02</p>

Under the Completed column, text in GREEN are new items

COMPLIANCE PLAN UPDATE 2002 Career Link Center - Mission - 3120 Mission Street					
Required Services and Definitions	Recommended Action	Completed	Work-in-Progress	Estimated Work-in-Progress Completion Date	Required Services' Projected Date of Implementation
Supportive Services Informing customers of the types of services available, eligibility and method for access	<ul style="list-style-type: none"> Develop common information Resource/ Referral directory for system-wide use Link to online resources through web site Integrate into Orientation Signage and printed materials 	<ul style="list-style-type: none"> Completed hiring of the Universal Client Representative 	Supportive Services <ul style="list-style-type: none"> Formalize the Orientation System for clients Development of the Internal System for the List of Services is in process by the Operations Committee 	6/30/02 6/30/02	6/30/02
		<ul style="list-style-type: none"> Completed hiring of the Universal Client Representative Completed hiring of the Specialist has been completed 			
Unemployment Insurance Claim	<ul style="list-style-type: none"> Integrate into Orientation and Center Resources Signage Train staff 	<ul style="list-style-type: none"> Unemployment Insurance Claim Access to filing for Unemployment Insurance claim is available at the Center Lobby staff are trained to direct appropriate clients to the location of this service and how to access it. Unemployment Insurance Information brochures are provided to clients 	Unemployment Insurance Claim <ul style="list-style-type: none"> Include Unemployment Insurance information to the Orientation System for clients (staff provided and self-assisted) List UI accessibility in marketing brochures and internal signage for List of Services 	6/30/02 6/30/02	6/30/02
		<ul style="list-style-type: none"> Unemployment Insurance cubicles to provide client privacy have been installed A TTY Unemployment Insurance phone has been installed 			
Welfare-to-Work Information and Eligibility	<ul style="list-style-type: none"> Integrate into Orientation and Center Resources Signage 	<ul style="list-style-type: none"> Welfare-to-Work Information and Eligibility DHS Program staff onsite (e.g., 	Welfare-to-Work Information and Eligibility <ul style="list-style-type: none"> Include in the Orientation System 	6/30/02	6/30/02

COMPLIANCE PLAN UPDATE 2002

Career Link Center - Mission - 3120 Mission Street

Required Services and Definitions	Recommended Action	Completed	Work-In-Progress	Estimated Work-In-Progress Completion Date	Required Services' Projected Date of Implementation
<p>• Team staff</p>	<p>STAFF - One Stop, Center Manager -1 FTE</p> <p>Manages operations of full service Center</p> <p>STAFF -Administrative Assistant -1 FTE</p> <p>Provides support to Center Manager</p> <p>STAFF -Computer Lab Specialist -1 FTE</p> <p>Provides customer assistance in computer lab</p> <p>External signage and partner directory</p>	<p>Employment Service, Calworks) provide WTW services</p> <p>Purchased HelpLink directory for the Center</p> <p>Additional Critical Needs</p> <p>Center Manager has been hired</p> <p>External signage has been completed</p> <p>Procedure for requesting equipment repairs, maintenance, upgrade, or new equipment has been established</p> <p>Additional staffing for Administrative Assistant, Universal Client Representative, Information and Referral Specialist have been hired</p> <p>Recommendation for data collection swipe card system was made by Management Committee</p>	<p>Information on WTW services include WTW in the List of Services</p> <p>Additional Critical Needs</p> <p>Internal signage of list of partners and services are under development</p> <p>Final decision for purchase of swipe card system is being made</p>	<p>6/30/02</p> <p>6/30/02</p> <p>6/30/02</p>	<p>TBD</p> <p>6/30/02</p>
<p>Additional Critical Needs</p> <p>Directly related to the provision of required services, needed to achieve and support full compliance and universal access</p>	<p>Technology/ Systems for Center within System</p> <ul style="list-style-type: none"> Case management / client tracking system, with potential for swipe card system Identify minimum level of tracking and implement in Center or upgrading computer, Internal access for the Center computers Additional costs to link Center to System network Expand, upgrade, and maintain technical capacity 				
<p>Customer Satisfaction Survey - required by WIA</p>	<p>Customer Satisfaction Opinion Meter- equipment to</p>	<p>Customer Satisfaction Survey</p> <p>Customer feedback drop box</p>	<p>Customer Satisfaction Survey</p> <p>Purchased Customer survey option</p>	<p>6/30/02</p>	<p>6/30/02</p>

Under the Completed column, text in GREEN are new items

COMPLIANCE PLAN UPDATE 2002 Career Link Center - Mission - 3120 Mission Street				
Required Services and Definitions	Recommended Action	Completed	Work-in-Progress	Estimated Work-in-Progress Completion Date
	<ul style="list-style-type: none"> survey customers in the Center Develop customer surveys for mailing and posting on-line <p>Capacity Building</p> <ul style="list-style-type: none"> Continuous improvement - implementation of process Staff training and conferences System training for staff, partners, and LWB on One Stop and services Workforce Investment Act-related topics Staff development <p>Supplies</p> <ul style="list-style-type: none"> estimated list of supplies for one year available includes consumables for use by Center customers and staff <p>Equipment</p> <ul style="list-style-type: none"> Purchase and install computers for customer and staff use for providing full array of core services Rental and maintenance of other equipment for customer use in the Center, such as copy machine and printer Should include additional computers for universal access, or equipment for ADA specialized equipment, as required by ADA 	<ul style="list-style-type: none"> and form has been installed EDD has in place regular customer service satisfaction survey 	meter	
		<ul style="list-style-type: none"> Training to increase staff knowledge of One Stop services and legislation 	<ul style="list-style-type: none"> Staff attended 3-day One Stop CWA conference Staff visited other Centers to learn other One Stop services Greg Newton gave 2 day training to staff about One Stop services. 	4/2/02 4/19/02 5/6/02
				4/4/02 4/19/02 5/7/02

COMPLIANCE PLAN UPDATE 2002 Career Link Center - Mission - 3120 Mission Street

Required Services and Definitions	Recommended Action	Completed	Work-in-Progress	Estimated Work-in-Progress Completion Date	Required Services' Projected Date of Implementation
Continuous improvement of service delivery system	<ul style="list-style-type: none"> Furniture Furnish common Center areas, such as Resource Room and conference rooms, as needed 	<ul style="list-style-type: none"> Continuous improvement of service delivery system Additional furniture and library resource materials has been purchased A system to track supplies used by the Center is in place Fax machine, printer, PCs, employer contact phones, copier are in operation for customer use Process for orientation of new partners and participating in Center activities is in place Handicapped parking spaces (two for customers) are now available Expenditure plan for the Center is in place 	<ul style="list-style-type: none"> Continuous improvement of service delivery system Purchase additional computers for customer use Additional training for staff and partners is being planned 	6/30/02 Continuous/ ongoing	Continuous/ ongoing

Under the Completed column, text in GREEN are new items

**ONE STOP SAN FRANCISCO
PROJECTED BASELINE SYSTEM BUDGET
PY' 2002-2003**

ONE STOP SYSTEM SUPPORT - INCLUDES CENTER, SATELLITES AND ACCESS POINTS		ESTIMATED COSTS 10% scenario	ESTIMATED COSTS 15% scenario
Toll-free phone system with messaging & routing features Phonebook and other listings for the System		-0- 5,000	20,000 5,000
One Stop System Marketing and Public Relations		20,000	100,000
Capacity Building - Training for partner staff, managers, & WIB members		8,000	40,000
SATELLITE CENTERS – CIVIC CENTER & SOUTHEAST			
ADA accommodations Equipment, signage, and physical modifications Resource Room materials - Videos, books, subscriptions and software Info and referral directories Customer satisfaction - Opinion Meters Supplies for customer usage Internet access for Career Link Civic Center		35,120	213,679
CAREER LINK CENTER – MISSION			
Baseline Budget for compliance maintenance		553,000	553,000
TOTAL FOR SYSTEM SUPPORT BUDGET		10%	15%
		621,120	931,679

ONE STOP SYSTEM TECHNOLOGY - INCLUDES CENTER, SATELLITES AND ACCESS POINTS	
Phase I	75,000
Phase II	75,000
Phase III	175,000
Phase IV	50,000
Phase V	125,000
TOTAL FOR TECHNOLOGY BUDGET	500,000

Workforce Investment San Francisco

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING OF THE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD ONE STOP COMMITTEE

DOCUMENTS DEPT.

MAY 24 2002

SAN FRANCISCO
PUBLIC LIBRARY

Date: Wednesday, May 29, 2002
Time: 1:00 P.M. – 3:00 P.M.
Location: Community College District Office
Auditorium
33 Gough Street
San Francisco, CA 94103

AGENDA APPEARS ON THE REVERSE SIDE

KNOW YOUR RIGHTS UNDER THE SUNSHINE ORDINANCE (Chapter 67 of the San Francisco Administrative Code)

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

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Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

Copies of the Sunshine Ordinance can be obtained at the San Francisco Public Library online at the City's Web site at www.ci.sf.ca.us/infoctr/sunshine/index.htm

OTHER ACCOMMODATIONS

In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.

Issued: May 23, 2002

PROPOSED AGENDA

1. Adoption of the Agenda (*Action Item*)
2. Public Testimony on Agenda Items (*Discussion Item*)
3. PY' 2002 WIA Allocations and Proposed Strategic Budget (*Action Item*)*
4. Public Testimony on Non-Agenda Items (*Discussion Item*)
5. Future Agenda Items (*Discussion Item*)
6. Adjournment (*Action Item*)

**please refer to previous mailing of the May 22, 2002 One Stop Committee meeting*

Workforce Investment San Francisco

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING OF THE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD ONE STOP COMMITTEE

DOCUMENTS DEPT.

JUN 21 2002

SAN FRANCISCO
PUBLIC LIBRARY

Date: Wednesday, June 26, 2002
Time: 1:00 P.M. – 3:00 P.M.
Location: Community College District
Office Auditorium
33 Gough Street
San Francisco, CA 94103

If you require special accommodations due to a disability, contact Roberta Fazande at least 72 hours in advance at 415/923-4265, TDD 800/735-2929 (CRS) or rfazande@picsf.org.

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Submitted: June 18, 2002

PROPOSED AGENDA

1. Adoption of the Agenda (*Action Item*)
2. Approval of the Minutes for the meetings held on May 22, 2002 and May 29, 2002 (*Action Item*)
3. Public Testimony on Agenda Items
4. 2002-2003 Final WIA Budget Update (*Information Item*)
5. Report - One Stop Technology Workgroup (*Information Item*)
6. Report - One Stop Marketing Workgroup (*Information Item*)
7. Report - One Stop Accessibility Workgroup (*Information Item*)
8. Strategic Planning for One Stop Committee and Workgroups 2002-2003 (*Discussion Item*)
9. Public Testimony on Non-Agenda Items
10. Future Agenda Items (*Discussion Item*)
11. Adjournment (*Action Item*)

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF CANCELLATION

OF THE

ONE STOP COMMITTEE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD

Date: Wednesday, July 24, 2002

Time: 1:00 p.m. – 3:00 p.m.

Location: Auditorium
Community College District Office
33 Gough Street
San Francisco CA 94103

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JUL 11 2002

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If you require special accommodation due to a disability, please call Roberta Fazande at 415-923-4265 or TDD 800-735-2929 (CRS) at least 72 hours in advance.

Issued: Tuesday, July 9, 2002

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING

OF THE

ONE STOP COMMITTEE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD

DOCUMENTS DEPT.

SEP 23 2002

SAN FRANCISCO
PUBLIC LIBRARY

Date: Wednesday, September 25, 2002
Time: 1:00 p.m. – 3:00 p.m.
Location: Auditorium
Community College District Office
33 Gough Street
San Francisco CA 94103-

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below and on the PIC's website, www.picsf.org.

AGENDA APPEARS ON THE REVERSE SIDE

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(Chapter 67 of the San Francisco Administrative Code)**

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Issued: Thursday, September 19, 2002

**PROPOSED AGENDA
ONE STOP COMMITTEE OF THE WISF BOARD
WEDNESDAY, SEPTEMBER 25, 2002**

1. Welcome and Introductions
2. Adoption of the Agenda (*Action Item*)
3. Approval of the Minutes for August 28, 2002 (*Action Item*)*
4. Public Testimony on Agenda Items
5. Report - One Stop Accessibility Workgroup (*Discussion and Possible Action Item*)
6. Report - One Stop Technology Workgroup (*Discussion and Possible Action Item*)
7. Report - One Stop Marketing Workgroup (*Discussion and Possible Action Item*)
8. Report – “Business on Board” Employer Forums (*Discussion Item and Possible Action Item*)
9. Role of the Satellite Centers – progress report from One Stop Operator Consortium (*Discussion Item and Possible Action Item*)
10. Future presentations from each One Stop partner/program (*Discussion Item and Possible Action Item*)
11. Introduction to One Stop Certification (*Discussion Item and Possible Action Item*)
12. Public Testimony on Non-Agenda Items
13. Future Agenda Items (*Discussion Item*)
14. Adjournment (*Action Item*)

* Information to be sent at a later date.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING OF THE

ONE STOP COMMITTEE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

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NOV - 7 2002

SAN FRANCISCO
PUBLIC LIBRARY

Date: Wednesday, November 13, 2002

Time: 1:00 p.m. - 3:00 p.m.

Location: Auditorium
Community College District Office
33 Gough Street
San Francisco CA 94103

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Issued: Wednesday, November 6, 2002

PROPOSED AGENDA
ONE STOP COMMITTEE OF THE WISF BOARD
WEDNESDAY, NOVEMBER 13, 2002

1. Adoption of the Agenda (*Action Item*)
2. Approval of draft minutes from the September 25, 2002 meeting (*Action Item*)*
3. Public Testimony on Agenda Items (Discussion Item)
4. Update - Workforce Investment San Francisco Board by-law amendments (*Discussion and Possible Action Item*)
5. Progress Reports (*Discussion and Possible Action Items*)
 - A. One Stop Accessibility Workgroup
 - B. One Stop Marketing Workgroup
 - C. One Stop Technology Project
6. Status Report - One Stop Operator Consortium's role regarding the One Stop Satellite Centers (*Discussion Item and Possible Action Item*)
7. One Stop Partner/Program Presentations (*Discussion Item and Possible Action Item*)
 - A. National Council on the Aging
 - B. Rapid Response
8. Public Testimony on Non-Agenda Items (Discussion Item)
9. Future Agenda Items (Discussion Item)
10. Future Meeting Schedule 2003 (Discussion Item)
11. Adjournment (*Action Item*)

* Information to be mailed.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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**DRAFT MINUTES OF THE
NOVEMBER 13, 2002 MEETING OF THE
ONE STOP COMMITTEE OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD**

JAN 10 2003

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PUBLIC LIBRARY

The meeting was held in the Auditorium of San Francisco Community College District Office located at 33 Gough Street in San Francisco, California 94103.

PRESENT:

William Allen, James Buick, Rosalie Bulach, Nicholas de Lorenzo, Phyllis McGuire, Craig Newmark, and Darlene Rutkowski

ABSENT:

Anita Aaron, Kathye Citron, John Poremba, Victor Revenko, and Abby Snay

STAFF:

Alice Chiu, Cathy deCristofaro, Karen Hart, Emma Perez, and Robert Schwab

PUBLIC:

Devra Edelman, Karl Jaensch, Tony Lugo, Mark Mak, Shawishi Monroe, Frances Rath, Nancy Rynd, Lucy Scarbrough, and Kevin Stange

The meeting was convened at 1:15 P.M. with a quorum established.

Motion to adopt agenda was made by Nicholas de Lorenzo and seconded by Phyllis McGuire.

Ayes: William Allen, James Buick, Nicholas de Lorenzo, Phyllis McGuire, Craig Newmark, and Darlene Rutkowski

Nays: None

Abstentions: None

Motion passed.

Motion to adopt minutes of the meetings held on September 25, 2002 was made by Nicholas de Lorenzo and seconded by Darlene Rutkowski.

Ayes: William Allen, James Buick, Nicholas de Lorenzo, Phyllis McGuire, Craig Newmark, and Darlene Rutkowski

Nays: None

Abstentions: None

Motion passed.

Chair Bulach asked if there was public testimony on agenda items. There was none.

Item 4 – Bylaw Amendments Update

Rosalie Bulach updated the Committee on the bylaw amendments. She noted one major change: Executive Committee will have a Finance Subcommittee. She also noted that the One Stop Committee might have joint meetings with the Employer Services Committee.

Item 5 – Progress Reports

One Stop Accessibility Workgroup

Darlene Rutkowski reported that the Accessibility Workgroup met on October 29th. At the meeting, Ray Grott from San Francisco State University's Rehabilitation Engineering Training program gathered information from Committee members on what is there at 3120 Mission, what has been done and what is there to do. She stated that there would be a full report at the next One Stop Committee meeting.

Nicholas de Lorenzo asked what are the next steps. Darlene Rutkowski replied that the next step is to complete the proposal to ensure that 3120 Mission Career Link Center is accessible to individuals with disabilities.

One Stop Marketing Workgroup

Cathy deCristofaro informed the Committee that the One Stop Marketing Workgroup met on October 30th and the workgroup plan to hire a marketing professional. Phyllis McGuire suggested contacting Small Business Development Center. She added that they might provide services at no charge for nonprofits.

One Stop Technology Workgroup

Robert Schwab reported that the technology project is in Phase I. Darlene Rutkowski asked when the implementation of the swipe card system will take place. Mr. Schwab replied that the swipe card system would be implemented by January 1, 2003 at the 3120 Mission site only.

William Allen asked if there have been challenges or concerns and if they have been addressed. Mr. Schwab replied that some have been resolved and some are in progress.

Item 6 – One Stop Operator Consortium's role regarding the One Stop Satellite Centers

James Buick reported on behalf of the Operator Consortium that members of the Consortium Directors and Management Committees and the Center managers were participating in an all-day retreat on November 27th, where they intended to address this as well as other issues. Mr. Buick will give a report on the outcome at the next meeting.

Item 7 – One Stop Partner/Program Presentations

National Council on the Aging (NCOA)

Nicholas de Lorenzo presented an overview of the National Council on the Aging's Senior Community Service Employment Program (SCSEP), a non-profit social agency, was founded in 1950 to improve the lives of older Americans. NCOA works to make "our society more equitable for older persons and to make it more caring and understanding of them so that their rights are protected and their needs are met in a humane, effective and efficient manner. The Senior Community Service Employment Program is a federally funded employment training program for income eligible people 55 years of age or older. The program is funded by the US Department of Labor (DOL) and administered by NCOA. Mr. de Lorenzo informed the Committee that NCOA administer a \$44 million dollar DOL grant.

NCOA has sixty-four subgrants, including Catholic Charities, Family Service Agencies, Office on the Aging and various Departments of Social Services. They also have eleven "Self-Managed" Projects. San Francisco was one of the first in this project and was established in January 1994. The trend is to reduce subgrants and manage the projects directly so as to have more control and efficiency.

Mr. de Lorenzo briefed the Committee on the history of NCOA. During the 1960s, Lyndon Baines Johnson announced the "War on Poverty" campaign. SCSEP, Title V of the Older American Act of 1965, was a product of this campaign. It is still believed that many mature people are looking for work with outdated skills. Some are no longer working due to layoffs, plant closedown or forced retirement. Others, mainly women, have never worked outside the home. Additionally, many people have been confronted with age discrimination by employer in hiring promotion, retention policies.

SCSEP fosters part-time job training for income eligible workers 55 years of age or older. All NCOA training sites involve community service work, and NCOA is an Equal Opportunity Program. SCSEP is also a holistic program because it addresses work-related needs of its participants, building on their strengths, while addressing the goal of NCOA. The goal of SCSEP is to help participants develop and retain permanent jobs (both part-time and full-time). This could mean learning new job skills, returning to school, securing legal services or being part of a support group.

The program objectives are to provide an opportunity for participants to acquire new skills and/or upgrade existing ones; to assist placement of participants in an unsubsidized job, thus allowing older persons to enroll and benefit from SCSEP; to advocate eliminations of employment barriers of community involvement; and to provide participants with income while they train.

The San Francisco NCOA has one administrative office located in the Flood Building at 870 Market Street. The SCSEP has contracted with approximately 160 agencies, which provided On-the-Job Training (OJT) to enrollees.

NCOA provide several types of services: thorough assessment, skills testing, physical exam, referrals to medical health treatment facilities, or legal assistance, OJT, classroom training, pre-screened candidates for employers, and follow-ups.

San Francisco receives approximately \$1.8 million to operate SCSEP and 85% of those funds must be spent on wages for enrollees. In-kind value of each enrollee is \$8000 per annum and the system receives approximately \$128,000 per annum.

Mr. de Lorenzo shared performance measures and information. There are 180 allocated slots and approximately 250 persons served annually. There is a 45% placement requirement and the mandate is to serve the oldest and the poorest. The average enrollee is 68 years of age.

On reporting and data collection, data are transferred to headquarters monthly and provided to DOL quarterly. Currently, there are no data provided to the local Workforce Investment Boards. The San Francisco office consistently surpasses their goals.

Marketing and public relations are handled locally as well as by headquarters office in Washington, DC.

Rapid Response

Cathy deCristofaro announced that the Rapid Response presentation would be at the next meeting as well as the presentation from the Department of Rehabilitation.

Item 8 –Public Testimony on Non-Agenda Items

Chair Bulach asked if there was public testimony on non-agenda items.

Employment Development Department (EDD)

Lucy Scarbrough announced the recent EDD decision to withdraw their staff currently stationed at the full service Center at 3120 Mission Street. EDD has cited a failure to resolve the seismic and ADA deficiencies at this facility as the reason for their decision. Responding on behalf of the Department of Human Services, Jim Buick said that ongoing efforts to address this issue would continue.

Item 10 – 2003 Meeting Schedule

The Committee agreed to meet on January 15, 2003 from 1 PM to 3 PM. Other 2003 meetings will be scheduled at the January meeting.

Motion to adjourn meeting was made by Nicholas de Lorenzo and seconded by James Buick.

Ayes: William Allen, James Buick, Nicholas de Lorenzo, Phyllis McGuire, Craig Newmark, and Darlene Rutkowski

Nays: None

Abstentions: None

Motion passed.

The meeting was adjourned at 2:36 P.M.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING

OF THE

ONE STOP OPERATION AND SERVICES COMMITTEE

AND

EMPLOYER SERVICES COMMITTEE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD

DOCUMENTS DEPT.

JAN 10 2003

SAN FRANCISCO
PUBLIC LIBRARY

Date: Wednesday, January 15, 2003

Times: One Stop Operation and Services Committee (OSOSC)

1:00 p.m. – 2:00 p.m.

Joint Meeting: OSOSC and ESC

2:00 p.m. – 3:00 p.m.

Employer Services Committee (ESC)

3:00 p.m. – 4:00 p.m.

Location: TBA

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Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

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Issued: Wednesday, January 8, 2003

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PROPOSED AGENDA
Wednesday, January 15, 2003

ONE STOP OPERATION AND SERVICES COMMITTEE
(1:00 P.M. – 2:00 P.M.)

1. Adoption of the Agenda (*Action Item*)
2. Approval of draft minutes from the November 13, 2002 meeting (*Action Item*)*
3. Public Testimony on Agenda Items (*Discussion Item*)
4. Status Report - One Stop Consortium Operator's role regarding the One Stop Satellite Centers (*Discussion and Possible Action Item*)
5. One Stop Committee Workgroup Reports (*Discussion and Possible Action Item*)
6. Status Report – One Stop Certification (*Discussion Item*)
7. Development of One Stop Access Point Memorandum of Understanding (*Discussion and Possible Action Item*)
8. Partner Presentation - Department of Rehabilitation (*Discussion Item*)
9. Public Testimony on Non-Agenda Items (*Discussion Item*)
10. Future Agenda Items (*Discussion Item*)
11. Adjournment (*Action Item*)

OSOSC AND ESC
(2:00 P.M. – 3:00 PM)

1. Adoption of the Agenda (*Action Item*)
2. Public Testimony on Agenda Items (*Discussion Item*)
3. Presentations (*information and Discussion Item*)
 - One Stop Operation and Services Committee
 - Employer Services Committee
4. Future Joint Committee Interaction and Areas of Mutual Concern (*Discussion Item*)
5. Customized Training Revised Policy Recommendations (*Discussion Item*)
6. Greg Newton Training (*Information Item*)
7. Public Testimony on Non-Agenda Items (*Discussion Item*)
8. Future Agenda Items (*Discussion Item*)
9. Adjournment (*Action Item*)

EMPLOYER SERVICES COMMITTEE
(3:00 PM – 4:00 PM)

1. Adoption of the Agenda (*Action Item*)
2. Approval of draft minutes from the December 18, 2002 meeting (*Action Item*)**
3. Public Testimony on Agenda Items (*Discussion Item*)
4. Customized Training Revised Policy Recommendations (*Action Item*)
5. Solutions Map – Policy Implications for Private Sector Services Inclusion (*Discussion and Possible Action Item*)
6. Report on San Francisco's Economy (*Discussion Item*)*
7. Adjournment (*Action Item*)

* Information enclosed.

** Information to be sent.

One Stop Operation and Services
Committee Materials

January 15, 2003
1:00 P.M. to 2:00 P.M.

Employer Services Committee
Materials

January 15, 2003
3:00 P.M. to 4:00 p.m.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: EMPLOYER SERVICES COMMITTEE **DATE:** JANUARY 8, 2003

FROM: PAMELA S. CALLOWAY, CHIEF OF STAFF

SUBJECT: RECOMMENDATION REGARDING CUSTOMIZED TRAINING (AGENDA ITEM 4)

Background

Customized Training is defined in the Workforce Investment Act as training that is designed to meet the special requirements of an employer or group of employers. Also, Customized Training may be provided for both unemployed persons seeking employment and employed persons hoping to improve their skills and advance toward self-sufficiency.

Customized Training may be directly provided by the employer in the form of On-the-Job Training or by a third party training provider either at the work site, training provider site, or other location in the community. While customized training is expected to meet the special needs of employers, it may involve technology training, production or service procedure training, upgrading of skills, workplace literacy or other appropriate purposes identified by the Local Board.

If WIA funds are used for Customized Training, special conditions exist for both the employer and trainee. Employers must pay for at least one-half of the cost of the training and agree to hire or retain the trainee. Different eligibility criteria apply to trainees depending on whether if they are employed or unemployed.

This memo is intended to inform your discussion through an outline on various policy implications and options regarding the implementation of a Customized Training Program.

History

At the April 25, 2002 Employer Services Committee meeting, committee members had a preliminary discussion on the concept of a local Customized Training Program.

At the end of the discussion, committee members arrived at the following consensus:

- (A) Ask Program Resource Committee's (PRC) consideration to set aside a defined portion of the WIA funds for a rapid turnaround system for customized training with criteria to be developed by staff.
- (B) Ask the Executive Committee to address the issue of "sole source" immediately. (See attached PIC and DOL correspondence related to the procurement of training providers.)
- (C) Ask the Program Resource Committee to examine all possible funding sources to fund customized training programs.

Benefits of Customized Training

- 1) Leverages private funds
- 2) Serves employers as customer
- 3) Assists participants to attain self-sufficiency, which fulfills Mayor's challenge to the Board
- 4) Links to economic development to create new jobs in San Francisco, and assist in business attraction and retention.
- 5) When Customized Training is used as Incumbent Worker Training, it creates new entry-level positions, as existing entry-level workers will advance to higher-level positions upon completion of training
- 6) Addresses gap (relative lack of employer provided training for entry-level jobs compared to higher skilled occupations) as identified in Employer Provided Training study by Kevin Stange
- 7) New sources of revenue for training providers
- 8) Builds employer awareness of other one-stop services
- 9) Builds employer services component of the one-stop
- 10) Provides fee-for-service revenue opportunity
- 11) Provides opportunity for employer and industry driven curriculum development

A 1998-1999 study by Isbell, Trutko, and Barnow on Customized Training cited the following advantages:

- a. A high percentage of trainees complete training, in part because they are motivated by the possibility of jobs at the end of the training.
- b. Almost everyone who successfully completes the training obtains full-time work in jobs paying at or above the JTPA wage.
- c. With appropriate training and other support services available through the JTPA program, retention rates for those entering training are high.
- d. Training enhances the trainee's skills and long-term employability both at the firm that sponsored the training and with other firms.
- e. Jobs are generally guaranteed if the trainee successfully completes training
- f. The jobs are generally full-time, paying at least the average JTPA wage, and often include fringe benefits and career advancement potential

Disadvantages of Customized Training

- 1) May diverted limited resources from very low-income households to the employed but not yet self-sufficient.
- 2) Shift portion of burden of training cost for incumbent workers from employer to public system.
- 3) Training may be so customized as to limit transferability of skills
- 4) Small firms may lack sufficient number of trainees to effectively participate in the program.
- 5) If training time is unpaid by employer, some low-income workers may not be able to participate.
- 6) Some firms are wary of partnership with government-funded programs, especially if there are time delays and extensive paperwork.

WIA Rules and Regulations

Customized training is defined under Section 101 (8) of the Workforce Investment Act (WIA) as follows:

- (A) Training that is designed to meet the special requirements of an employer (including a group of employers);
- (B) Training that is conducted with a commitment by the employer to employ or continue to employ an individual on successful completion of the training; and
- (C) Training for which the employer pays for not less than 50% of the cost of the training

In addition to the definition, customized training shall be conducted in accordance to the following WIA Rules and Regulations (29 CFR 663.230 and 663.720):

- (A) Customized training must relate to the introduction of new technologies, introduction to new production or service procedures, upgrading to new jobs that require additional skills, workplace literacy, or other appropriate purposes identified by the Local Board
- (B) Individual participants must be WIA eligible and enrolled, and if employed, have earnings that are less than self-sufficient as defined by the local workforce investment area.

Recommendation

Adopt the Draft Policy for Customized Training outlined below and direct staff to undertake the development of procedures and resources necessary to implement a Rapid Turnaround Customized Training Program effective July 1, 2003. Direct the WISF Finance Committee to set-aside 15% of WIA Adult Fund in PY July 1, 2003 – June 30, 2004 to fund the Program.

Customized Training Draft Policy – Revised December 18, 2002

Draft Policy	Staff's Comments	Committee & Public's Comments
<p>(1) Employer must shall make a commitment to hire (for OJT) or <u>advance</u> (for existing employee) <u>see staff's comment</u> trainee upon successful completion of training. (WIA Sec.101(8); Final Rule 663.715(b))</p>	<p>Advancement of trainee upon completion of training is a Local Policy.</p> <p>Advancement may take the form of wage enhancement and/or increase in job responsibilities for existing employees.</p>	<p>If OJT, employer must have a commitment to hire trainee upon successful completion of training (through good faith effort).</p> <p>If existing employee, employer must have a commitment to advance the trainee upon successful completion of the training (through good faith effort).</p> <p>Employers and training providers may define the term "successful" up-front.</p>
<p>(2) For OJT contracts, employer must pay for at least 50% of the training cost plus a 40%-negotiated administrative fee where applicable. (WIA Sec 101(8); Final Rule 663.715 (b))</p>	<p>Up to 50% training cost may be disbursed to the training providers</p>	<p>Staff needs to investigate on whether the fee can be in-kind.</p> <p>May need to differentiate between OJT and non-OJT contracts.</p>
<p>(3) Customized training shall be available <u>only</u> to local San Francisco and SFO businesses. (Local Policy)</p>		
<p>(4) Customized training shall be related to <u>high-demand</u> occupations identified by the Local Board. (<u>"Linked to the Employment Opportunities in the Local Area..."</u> WIA Sec 134 (4)(A) (iii))</p>	<p>Industry clusters may be targeted</p>	<p>Jobs that provide the greatest opportunity for growth, and /or the greatest likelihood of full-time continued employment.</p>
<p>(5) Customized training shall be conducted only in occupations that provide opportunity for advancement and self-sufficiency. (WIA Final Rule 663.230)</p>	<p>Self-sufficiency wage shall be determined by Local Policy criteria for employment leading to self-sufficiency. eg. % of self sufficiency wage, document career ladder, benefits and permanent jobs. <u>PRC is undertaking this matter</u></p>	

Draft Policy	Staff's Comments	Committee & Public's Comments
(6) Customized training shall target low-skilled workforce as identified by Local Board.	Low skilled workforce is determined by wage level, basic skill deficient, language barrier, lacks High School diploma, less than 1 year work experience	The program shall target not only the low-skilled workforce, as (1) a significant number of high-skilled workers are unemployed and need retraining and (2) a lot of older workers are re-entering the workforce and need training.
(7) In cases of limited funds, customized training priority shall be given to local businesses in economically distressed areas.	Businesses located in the State Enterprise Zone, or the Federal Renewal Community.	Board needs to define "limited funds" Priority shall also be given to jobs with good job qualities, such as high retention rate, wage advancement opportunity, provide employees with greatest opportunity to become self-sufficient and sustain long term growth within the company.
(8) Customized training services shall be a component of at least one the One-Stop center. (Local Policy)		
(9) Training providers shall be identified through an open process. Once Local Board identifies the "high demand occupations", staff shall establish a list of selection criteria to be included in the solicitation. Priority shall be given to local trainers. (Local Policy)	Staff may need to conduct legal studies and report back to Committee with various scenarios as this draft policy may hinder other employer-friendly efforts listed in this draft, such as Rapid Turnaround, and employer's choice.	
(10) For employed workers, customized training is limited to individuals not earning a self-sufficient wage as determined by WISF Board	A self-sufficiency standard adjusted for family size will need to be adopted by the WISF Board. A PRC Workgroup is undertaking this issue.	

Draft Policy	Staff's Comments	Committee's and Public's Comments
(11) Customized Training resources shall be aligned, where possible and appropriate, with economic development initiatives. (Local Policy)	Intended to attract new businesses and jobs to San Francisco	Combine with #7 with emphasis on the <u>priority of quality of the jobs over the location. Job quality is the absolute standard.</u>
(12) Each customized training project shall be monitored and evaluated for performance and continuous improvement purposes. (Local Policy)	Customer satisfaction (employers and trainees), completion rate, trainees' attendance records, number of trainees passed competency tests administered by companies if appropriate, retention rate, and wage after training. <u>Also, staff shall evaluate labor market needs.</u> Data on impact on employers' recruitment cost, retention, turnover and staffing pattern change, shall be gathered from employers on a voluntary basis.	Staffs are asked to report these data quarterly to the Board, and a more comprehensive report to the ESC.
(13) In instances where the employer pays 100% of the training costs, policies (4), (6) and (10) are waived. (Local Policy)		
(14) Customized training trainee must be committed to advance to higher skilled job after completion of training. (Local Policy)		<u>Clarify expectation of trainee and employer up-front.</u>
(15) Trainee shall be committed to stay with the company for at least one year after completion of training. (Local Policy)		<u>Through good faith effort not contractual</u>

Draft Policy	Staff's Comments	Committee's & Public's Comments
<p>(16) Customized training shall be promoted and coordinated through the one-stops, training providers, and partner agencies of the WISF network. (Local Policy)</p>	<p><u>Design a multi-faceted approach on how the employers are engaged. Provide a valuable resource for the entire workforce network.</u></p>	<p><u>Access to this program should be through the One-Stop San Francisco system.</u></p>
<p>(17) Funds used for Customized Training shall be prioritized in the following order: (1) Private funds, (2) Employment and Training Panel (ETP) fund, (3) Pell Grant and (4) WIA (Local Policy)</p>	<p><u>To complement the Rapid Turnaround concept, WIA Adult Fund may need to be used up-front to pay for the training in advance, even though the trainee is eligible for other sources of funding. Funds such as Pell Grant allows one to apply for reimbursement after the training has begun.</u></p>	

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: EMPLOYER SERVICES COMMITTEE **DATE:** DECEMBER 18, 2002

FROM: PAMELA S. CALLOWAY, CHIEF OF STAFF

SUBJECT: POLICY IMPLICATIONS REGARDING THE INCLUSION OF PRIVATE SECTOR SERVICES ON THE SOLUTIONS MAP

BACKGROUND

At the October 23rd Employer Services Committee meeting, the Committee had a preliminary discussion on strategies to maximize the benefits of the Solutions Map. Members agreed that, at minimum, the Solutions Map should be made available on the Internet. Staff is currently implementing the process of updating and revising the Solutions Map to increase its usefulness. This process involves creating linkages between the Solutions Map's homepage to each provider's web site, developing links to each service's detailed description, and processing addition or deletion of current services profiled on the Map.

Based on feedback received on the Solutions Map, staff raised the issue of inclusion of private sector services. The Committee asked staff to develop policy implications related to such. The policy implications are outlined below with three major components: (1) use public funds to promote public service providers only, (2) use public funds to promote private and public sector service providers, and (3) charge private providers a fee to profile services on the Map.

POLICY IMPLICATIONS

(1) Publish Public Service Providers Only

- a) Limits customer's choice
- b) Service gap may exist
- c) Limits the opportunity to charge publishing fee for private sector providers

(2) Use Public Funds to Promote Private and Public Service Providers

In an attempt to determine the number of private workforce providers in San Francisco and its vicinity, staff aggregated the data by using the San Francisco Yellow Pages directory. More than 1200 Yellow Pages listings of workforce development related firms were found in the categories classified below:

Categories

Listings

Advertising Personnel Recruitment	5
Business Consultants	176
Business and Economic Development	15
Computer Training	56
Employee Assistance Program	1
Employee Benefits & Compensation	19
Employee Leasing	9

Employment Agencies	275
Employment Opportunities	7
Employment Service – (Govt., Company, Fraternal)	4
Employment (Technical)	44
Employment (Temporary)	138
Executive Search	155
Hiring	0
Human factors	10
Human Resources	0
Management Consultants	155
Management Training	11
Outplacement	12
Outsourcing	0
Personal consultants	29
Recruiters	0
Tax Consultants	37
Temporary	0
Training (Program design and development)	50
Total:	1,208

It is evident that the number of private workforce services in the San Francisco area is extensive. By publishing private sector services using public funds, the following consequences may result:

- a) Use of public funds to develop the publication
- b) Need to make decision on which providers will be selected to profile, as funds are limited.
- c) Implies endorsement of the private sector services listed
- d) Difficult to verify accuracy of so many listings
- e) Duplicates and will not replace the Yellow Pages as reference of choice
- f) Intensifies competition between the public sector and the private sector
- g) Promotes customer's choice

(3) Charge private providers a fee for the publication

If a charge is required for private service providers to profile services on the Solutions Map, the following may result:

- a) Requires WISF to consider fee-for-service policy framework
- b) Generates fee-for-service revenue for the public workforce system
- c) Creates opportunity for private sector recognition of and involvement in the public workforce network
- d) Items 2 a, b, and c above are resolved
- e) Promotes customer choice

OPTIONS FOR CONSIDERATION

- a) Include but not solicit private providers, but charge and verify accuracy of those who come to us. Should we charge a listing fee?
- b) Include public sector listings only
- c) Include and actively solicit both private and public

Staff will be available at your December 18th to answer any questions you may have. Should you have any questions prior to the meeting, please contact Robert Schwab at 415-431-8700.

Research Brief: 10 Things to Know About San Francisco's Economy and Employers

A publication to inform San Francisco's workforce and economic development community

DRAFT: December 10, 2002

Workforce Investment San Francisco Board

NOTE: The aim of this Research Brief is to provide members of San Francisco's workforce and economic development community with a basic orientation to the size, nature, structure, and historical evolution of San Francisco's economy in one easy-to-read document. This basic orientation will serve as a benchmark for future analysis into how San Francisco's economy is likely to change in the future. Your comments and feedback on this draft version are very welcome. Please direct them to Kevin Stange at 415-557-6569 or kevin_stange@ci.sf.ca.us.

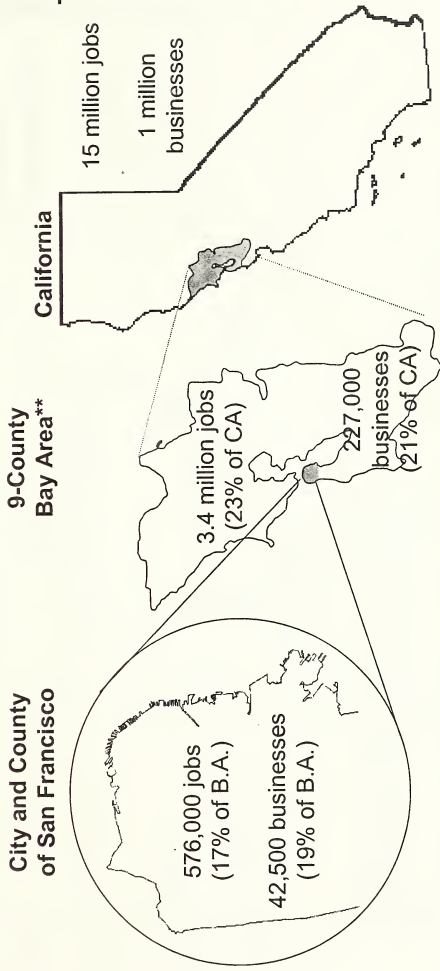
10 Things to Know About San Francisco's Economy and Employers

1. With approximately 600,000 jobs and 40,000 businesses, the City and County of San Francisco is an important component of the Bay Area regional economy.
2. San Francisco is highly integrated with this regional economy – nearly half of its workforce commutes in from surrounding communities while 20% of its employed residents work outside the city.
3. Over the last 30 years, San Francisco's employment has typically been slower growing than surrounding Bay Area counties, even during the boom of the late 1990's. The maturity of the city's economic base or and its constrained physical space likely explain this slow growth.
4. The city's economy is particularly dependent on its major export industry clusters: the Tourism, Corporate Deal-Making, Communications/Media, and Government Administration clusters. Export industries bring income to the city's residents and businesses from the outside, enabling spending on resident-consumed goods and services and fueling local employment growth.
5. The city's economy is diversified across many industries, but is particularly concentrated in industries which comprise its export clusters.
6. The city's industrial structure has shifted considerably over the last 30 years with the exceptional growth of the city's Service industry. Government and Finance employment has been stable for quite a while, while Trade has grown steadily with the overall economy. Transport, Communications, Utilities, and Construction have recently rebounded, while Manufacturing continues to decline.
7. The city's occupational structure is somewhat bifurcated, with many high-wage professional/technical and low-wage service jobs, but relatively fewer moderately-paid blue-collar jobs compared to the rest of the Bay Area.
8. While most San Francisco businesses are small, large companies account for a greater share of employment. The typical San Francisco worker is part of a 100 to 250-person firm.
9. The city's largest employers span a wide range of industries. Government organizations such as the City and County, UCSF and SFUSD and Fortune 500 headquarters such as Charles Schwab, Wells Fargo, PG&E, and Pacific Bell all employ a significant number of San Francisco workers.
10. Spatially, employment is concentrated in the office-heavy northeast districts of the city. Other districts have relatively less economic activity and employment is more concentrated in resident-serving retail and cultural/educational/health organizations. Most industrial activity is concentrated in the city's eastern neighborhoods.

With approximately 600,000 jobs and 40,000 businesses, San Francisco is an important component of the Bay Area regional economy.

Employment* and Number of Businesses

3rd Quarter, 2001



* Excludes the following types of workers:.....

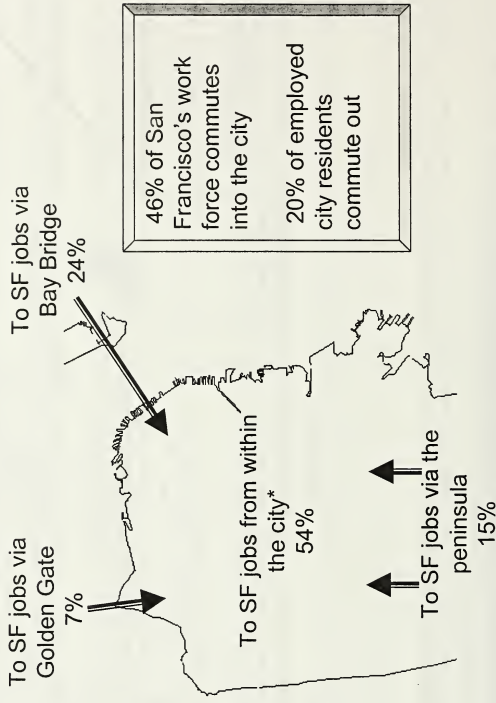
** Includes Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano and Sonoma counties

SOURCE: California Employment Development Department, Size of Business report

San Francisco is highly integrated with this regional economy – nearly half of the city's workforce commutes in from surrounding communities, while 20% of its employed residents work outside the city.

Commuters to San Francisco Jobs

% of total jobs in San Francisco County, 2000 projection



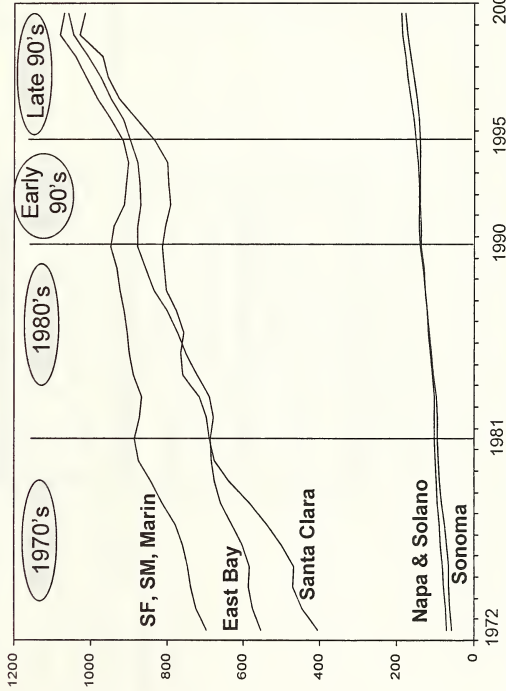
* An estimated 20% of all employed city residents commute to jobs outside San Francisco. These individuals are not included in this analysis.

SOURCE: Sims' (2000) analysis of commute and employment data based on 1998 projections from the Association of Bay Area Governments and the Metropolitan Transportation Commission.

Over the last 30 years, San Francisco's employment has typically been slower growing than surrounding Bay Area counties, even during the boom of the late 1990's. The maturity of the city's economic base or and its constrained physical space likely explain this slow growth.

Average Annual Employment*

1972-2001, thousands

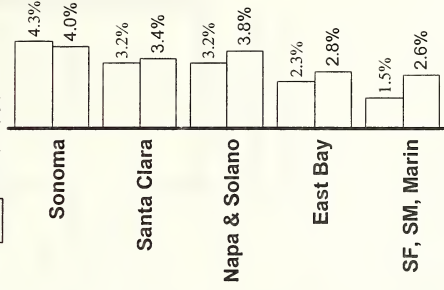


Employment Growth

Annual growth rate

1972-2001

1995-2001

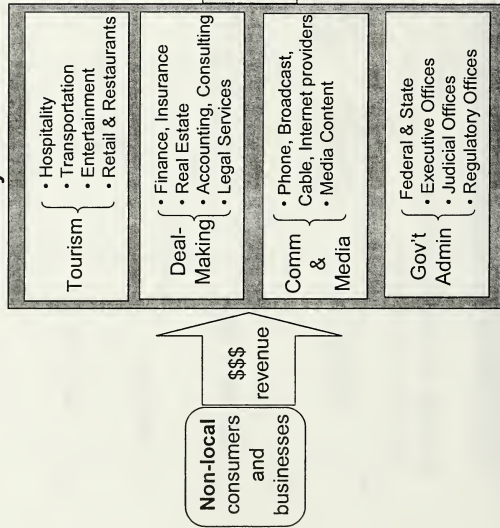


*Jobs are classified by place of work, regardless of where the employee lives. Does not include agricultural workers, the self employed, unpaid family workers, and private household employees. Multiple job holders may be counted twice.

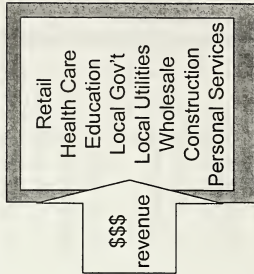
SOURCE: BLS Current Employment Statistics program

The city's economy is particularly dependent on its major export industry clusters: the Tourism, Corporate Deal-Making, Communications/Media, and Government Administration clusters. Export industries bring income to the city's residents and businesses from the outside, enabling spending on resident-consumed goods and services and fueling local employment growth.

San Francisco's Export Industry Clusters*



San Francisco's Resident-Serving Industries



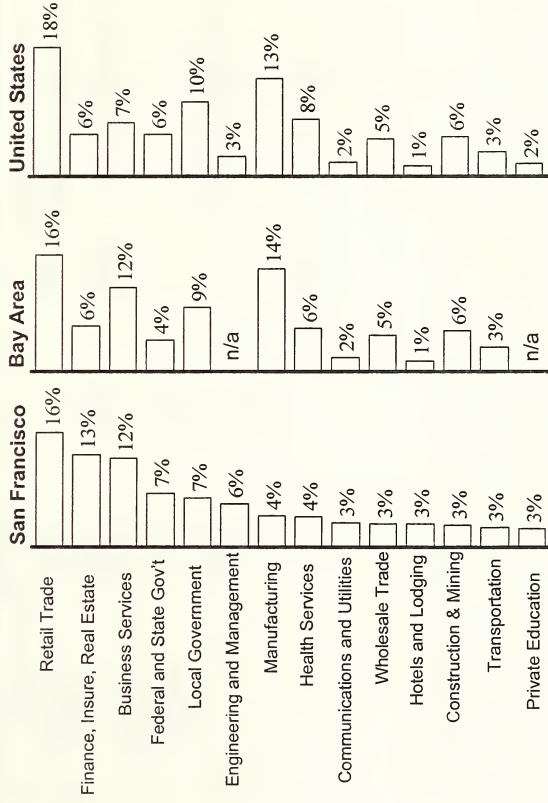
* Many industries, retail for example, sell goods or services to both residents and non-residents and thus are both export and resident-serving industries.

SOURCE: Sims, Kent 2000. "San Francisco Economy – Implications for Public Policy," SPUR.

The city's economy is diversified across many industries, but is particularly concentrated in industries which comprise its export clusters.

Higher share of employment vs B.A. and U.S.

Share of Total Employment, Annual Average, 2001

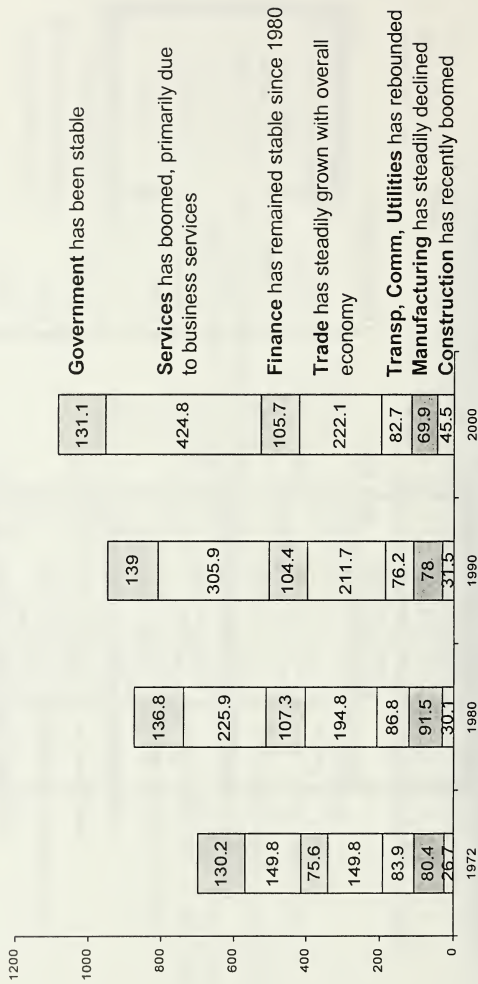


* Smaller categories include social services, amusement services, auto repair, motion pictures, personal services, legal services, museums, membership organizations, and agricultural services
SOURCE: California Employment Development Department, US Bureau of Labor Statistics Current Employment Survey

The city's industrial structure has shifted considerably over the last 30 years with the exceptional growth of the city's Service industry. Government and Finance employment has been stable for quite a while, while Trade has grown steadily with the overall economy. Transport, Communications, Utilities, and Construction have recently rebounded, while Manufacturing continues to decline.

Average Annual Employment*

San Francisco, San Mateo, Marin Counties, thousands



*Does not include agricultural workers, the self employed, unpaid family workers, and private household employees. Multiple job holders may be counted twice.

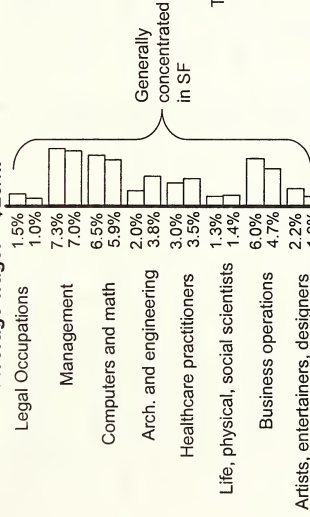
SOURCE: BLS Current Employment Statistics program

The city's occupational structure is somewhat bifurcated, with many high-wage professional/technical and low-wage service jobs, but relatively fewer moderately-paid blue-collar jobs compared to the rest of the Bay Area.

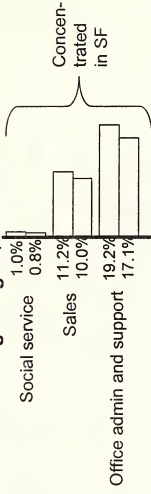
Share of Total Employment, 2000

SF, Marin, San Mateo*
 Bay Area

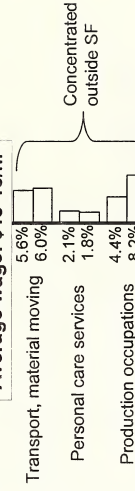
Average wage: > \$25/hr



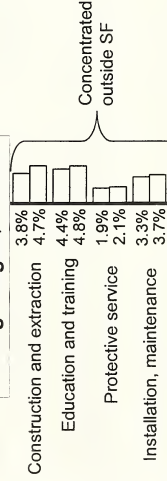
Average wage: \$16-19/hr



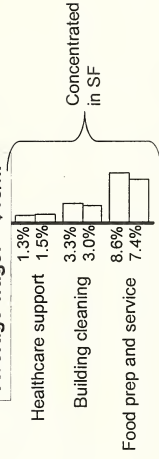
Average wage: \$13-15/hr



Average wage: \$19-25/hr



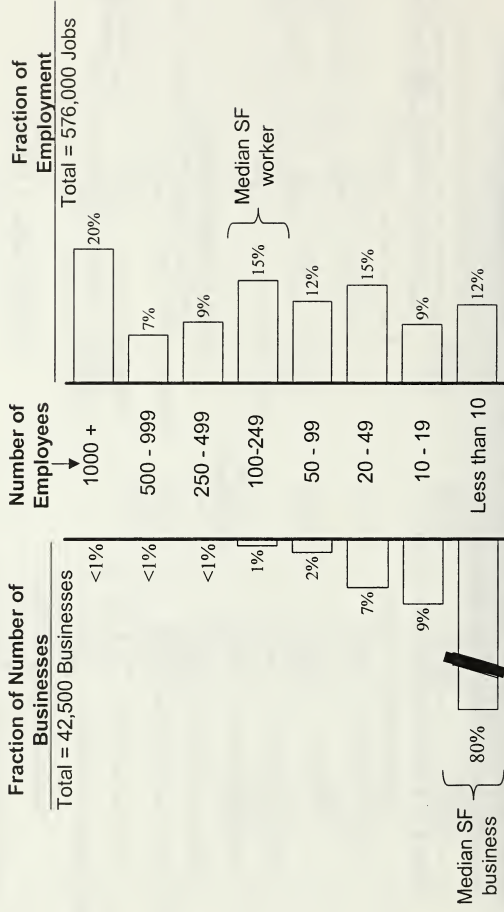
Average wage: < \$13/hr



*Occupation data not available at county level
 Note: Broad occupational categories are listed in descending order by average wage.
 SOURCE: US Bureau of Labor Statistics Occupational Employment Statistics Survey

While most San Francisco businesses are very small, large companies account for a greater share of employment. The typical San Francisco worker is part of a 100 to 250-person firm.

Fraction of Businesses and Employment* by Size of Business San Francisco County, 3rd Quarter, 2001



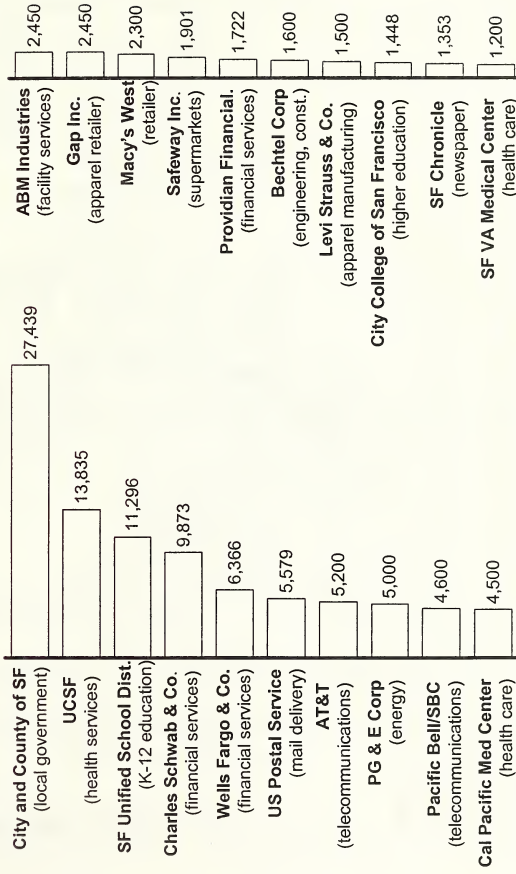
* Excludes the following types of workers:.....

SOURCE: California Employment Development Department, Size of Business report

The city's largest employers span a wide range of industries. Government organizations such as the City and County, UCSF and SFUSD and Fortune 500 headquarters such as Charles Schwab, Wells Fargo, PG&E, and Pacific Bell all employ a significant number of San Francisco workers.

Number of Employees in San Francisco County*

2000

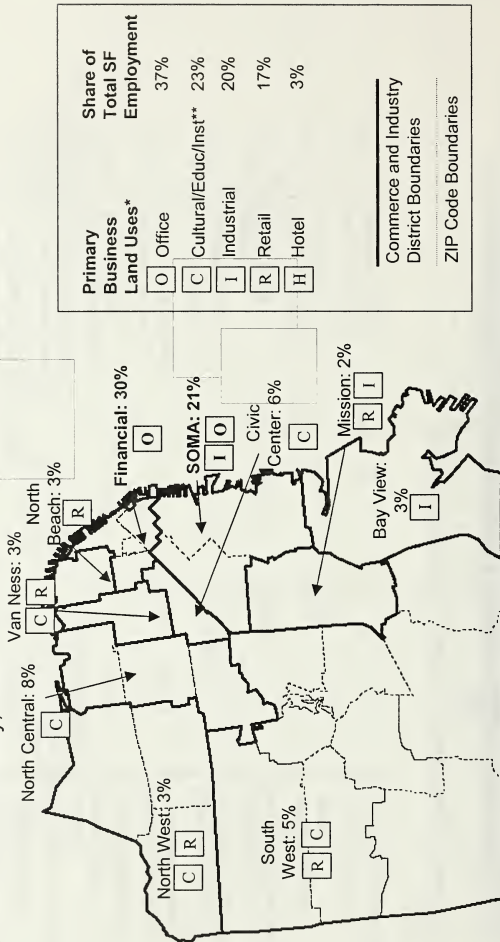


* The US Federal Government, the State of California, Kaiser Foundation, Bank of America, St. Luke's Hospital, and the Federal Reserve Bank were not included in analysis, but are also major San Francisco employers.

SOURCE: San Francisco Business Times

Spatially, employment is concentrated in the office-heavy northeast districts of the city. Other districts have relatively less economic activity and employment is more concentrated in resident-serving retail and cultural/educational/health organizations. Most industrial activity is concentrated in the city's eastern neighborhoods.

Fraction of San Francisco Employment by Business District and Land Use San Francisco County, 2000



* Business land uses representing at least one quarter of a district's employment are identified on the map

** Includes schools, hospitals, clinics, social service facilities, museums, movie theaters, and other recreational facilities

SOURCE: San Francisco Planning Department, "Commerce and Industry Inventory 2001"

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING
OF THE
ONE STOP OPERATION AND SERVICES COMMITTEE
AND
EMPLOYER SERVICES COMMITTEE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

Date: Wednesday, January 15, 2003

Times: One Stop Operation and Services Committee (OSOSC)

1:00 p.m. – 2:00 p.m.

Joint Meeting: OSOSC and ESC

2:00 p.m. – 3:00 p.m.

Employer Services Committee (ESC)

3:00 p.m. – 4:00 p.m.

Location: Community College District Office
 Auditorium
 33 Gough Street
 San Francisco, CA 94103

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AGENDA APPEARS ON THE REVERSE SIDE

KNOW YOUR RIGHTS UNDER THE SUNSHINE ORDINANCE
(Chapter 67 of the San Francisco Administrative Code)

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
 Sunshine Ordinance Task Force
 City Hall, Room 244
 1 Dr. Carlton B. Goodlett Place
 San Francisco, CA 94102-4683
 415-554-7724 Fax: 415-554-5163
 E-mail: donna_hall@ci.sf.ca.us

Copies of the Sunshine Ordinance can be obtained at the San Francisco Public Library online at the City's Web site at <http://www.sfgov.org/bdsupvrs/sunshine.htm>

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If you require special accommodation due to a disability, please call Roberta Fazende at 415-923-4285 or TDD 800-735-2929 (CRS) at least 72 hours in advance.

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Issued: Wednesday, January 8, 2003

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

DRAFT MINUTES OF THE

JANUARY 15, 2003 MEETING OF THE

ONE STOP COMMITTEE OF THE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD

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MAR 17 2003

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The meeting was held in the Auditorium of San Francisco Community College District Office located at 33 Gough Street in San Francisco, California 94103.

PRESENT:

Anita Aaron, William Allen, Rosalie Bulach, Kathye Citron, Nicholas de Lorenzo, Phyllis McGuire, Craig Newmark, John Poremba, Victor Revenko, and Darlene Rutkowski

ABSENT:

James Buick and Abby Snay

STAFF:

Alice Chiu, Asper Choup, Cathy deCristofaro, Wes Dixon, Lucia Hughes, Emma Perez, and Robert Schwab

PUBLIC:

Larry Braynen, Betty Broussard, Cynthia Buitrago, Louis Dunn, Devra Edelman, Robert Hector, Julie Kim, Patrick Klune, Ted Koch, Cheemeny Lee, Bernard Leung, Mark Mak, Rhody McCoy, Shawishi Monroe, Stephen Poulin, Patricia Peretz, Mario Quevedo, Linda Rosel, Kevin Stange, Diane Wagner, and Les Wong

The meeting was convened at 1:10 P.M. with a quorum established.

Motion to adopt agenda was made by Nicholas de Lorenzo and seconded by Kathye Citron.

Ayes: Anita Aaron, William Allen, Kathye Citron, Nicholas de Lorenzo, Phyllis McGuire, Craig Newmark, John Poremba, Victor Revenko, and Darlene Rutkowski

Nays: None

Abstentions: None

Motion passed.

Motion to adopt minutes of the meetings held on November 13, 2002 was made by Nicholas de Lorenzo and seconded by Craig Newmark.

Ayes: Anita Aaron, William Allen, Kathye Citron, Nicholas de Lorenzo, Phyllis McGuire, Craig Newmark, John Poremba, Victor Revenko, and Darlene Rutkowski

Nays: None

Abstentions: None

Motion passed.

Chair Bulach asked if there was public testimony on agenda items. There was none.

Item 4 – One Stop Consortium Operator's Role

John Poremba report that the One Stop Consortium is going to pursue approval from the One Stop Committee to have its oversight responsibilities expanded to include the two satellites Centers (801 Turk and 1800 Oakdale). He asked that this item be included on the agenda at the next meeting. The Consortium will present recommendations concerning their role as the Operator of the Satellite sites, including information about alternatives for the designation of the local One Stop Operator, and what the legislation allows for.

Phyllis McGuire informed the Committee that budget cuts made at City College of San Francisco might affect its participation in the One Stop partnership.

John Poremba informed the Committee that the Employment Development Department (EDD) staff would be moving out of the 3120 Mission Career Link Center. He added that he is meeting with the Consortium to discuss ways to provide services without the physical presence of EDD staff.

Chair Bulach requested a report from Department of Human Services as the leaseholder for 3120 Mission Street. This report will provide a basis for the discussion about continuing to locate the comprehensive One Stop at 3120 Mission and will include information about both DHS' experience with exploring alternative locations, as well as, their willingness to do so.

Item 5 – Progress Reports

One Stop Accessibility Workgroup

Darlene Rutkowski reported that the Accessibility Workgroup would be presenting recommendations at the next meeting.

One Stop Technology Workgroup

Robert Schwab reported that the swipe card system is currently being implemented and will have a report at the end of March.

Because of time constraint, Chair Bulach proceeded to agenda item 8.

Item 8 –Department of Rehabilitation Presentation

Darlene Rutkowski and Department of Rehabilitation staff presented an overview of its services. The presentation was as follows:

History

The Vocational Rehabilitation Services (VR) program is authorized by Title IV of the Workforce Investment Act (WIA) and incorporates the Federal Rehabilitation Act of 1973, as amended. The VR program is the department's primary program. The purpose of the program is to assist individuals with disabilities in preparing for, entering into, and retaining competitive employment in integrated work settings. The department accomplishes this by providing services such as client assessment, counseling and guidance, purchase of individualized rehabilitation services and job placement. The program serves individuals with a full range of physical and mental disabilities, pursuant to federal law.

Funding source

Funding for the program comes primarily from a state and federal partnership in which the state matches one dollar to approximately four dollars in federal funds. Federal funds are provided

under Title I, Section 110 of the Rehabilitation Act. The fiscal year (FY) 2002-03 Budget Act (Chapter 379, Statutes of 2002) includes funding for the VR program at a level of \$328.9 million, with \$44.44 million provided by the General Fund, \$273.3 million coming from federal funds and the remainder of \$11.2 provided by a combination of reimbursements and special deposit funds. This accounts for approximately 68% of the department's total 2002-03 budget.

Mission statement

The California Department of Rehabilitation works in partnership with consumers and other stakeholders to provide services and advocacy resulting in employment, independent living and equality for individuals with disabilities.

Application process

The consumer may apply in person or by mail. Eligibility will be decided within 60 days. He/she would need to provide sufficient information to process their application (general data, economic information, and medical information).

Eligibility

An individual may be eligible for our program based on the following:

- o Has a physical or mental impairment that makes it difficult to get or keep a job;
- o Needs vocational rehabilitation services to obtain or retain employment; and
- o Can benefit from our services

Order of selection

Priority of service is based on:

- o An individual's level of severity of disability
- o The numerical score of significance scale
- o Date of application

Planning process

Informed choice:

- o Deciding on an employment goal is an important step and may take time. The consumer and his/her counselor will explore the client's unique strengths, resources, priorities, interests, and needs.
- o The client and his/her counselor will work together to make an informed choice for the consumer's career goal.

Individual Plan for Employment (IPE)

It will contain:

- o Consumer's employment goal
- o Consumer's responsibilities
- o Counselor's responsibilities
- o Services to be provided
- o Process of evaluating your progress

Services

Counseling and guidance

Medical services and equipment

Additional assessments and evaluations

Vocational training and education

On-the-Job training

Technical aids and devices

Transportation assistance

Job placement services

Work tools, equipment and clothes

Services for family members

Case closure

- o Successfully employed at least 90 days!
- o Consumer is no longer interested in services
- o Counselor cannot locate the client
- o Consumer is no longer available for services
- o Consumer does not achieve suitable employment
- o Consumer fails to cooperate

Consumer's responsibilities

- o Apply for services from other sources when available
- o Talk to counselor about ANYTHING that may affect the success of the plan (IPE)
- o Attend and fully participate in assigned activities
- o Provide reports of progress and grades to the counselor
- o Discuss with counselor the purchase of any goods or services to receive prior approval

San Francisco district

- o Covers both San Francisco and San Mateo counties – staff of approximately 86
- o Works with 3700 individuals on annual basis – success ratio is approximately 50%
- o Actively involved with One Stop Centers since WIA legislation implemented

Chair Bulach announced that the next Committee meeting would be on February 20, 2003 from 1 to 3 PM.

The Committee adjourned at 2:00 P.M.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

Please note that the attached minutes of the Joint Session of the One Stop Operations and Services Committee and the Employer Services Committee on January 15, 2003 will be revised to include more detailed discussion.

**The updated minutes will be provided at the meeting.
Thank you.**

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MAR 17 2003

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

**DRAFT MINUTES OF THE
JANUARY 15, 2003 JOINT MEETING OF THE
ONE STOP COMMITTEE AND
EMPLOYER SERVICES COMMITTEE OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD**

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The meeting was held in the Auditorium of San Francisco Community College District Office located at 33 Gough Street in San Francisco, California 94103.

PRESENT:

Anita Aaron, William Allen, Steve Arcelona, Rosalie Bulach, Kathy Citron, Nicholas de Lorenzo, Theresa Feeley, Phyllis McGuire, Nathan Nayman, Craig Newmark, John Poremba, Victor Revenko, Darlene Rutkowski and Ave Seltam

ABSENT:

Irene Agnos, James Buick, Corliss Fong, Scott Hauge, Abby Snay and Stan Warren

STAFF:

Alice Chiu, Asper Choup, Cathy deCristofaro, Wes Dixon, Lucia Hughes, Emma Perez, and Robert Schwab

PUBLIC:

Larry Braynen, Betty Broussard, Cynthia Buitrago, Louis Dunn, Devra Edelman, Robert Hector, Julie Kim, Patrick Klune, Ted Koch, Cheemeny Lee, Bernard Leung, Mark Mak, Rhody McCoy, Shawishi Monroe, Stephen Poulin, Patricia Peretz, Mario Quevedo, Linda Rosel, Kevin Stange, Diane Wagner, and Les Wong

The meeting was convened at 2:05 P.M. with a quorum established.

Motion to adopt agenda was made by Nicholas de Lorenzo and seconded by Kathy Citron.

Ayes: Anita Aaron, William Allen, Steve Arcelona, Rosalie Bulach, Kathy Citron, Nicholas de Lorenzo, Theresa Feeley, Phyllis McGuire, Nathan Nayman, Craig Newmark, John Poremba, Victor Revenko, Darlene Rutkowski and Ave Seltam

Nays: None

Abstentions: None

Motion passed.

Item 3 - Presentations

One Stop Committee Overview

Cathy deCristofaro presented an overview of the One Stop Committee's roles and responsibilities, accomplishments, and next steps. After she introduced the members of the Committee, Ms. deCristofaro reviewed the Committee's bylaws (amended November 20, 2002). The Committee must maintain membership of not less than eleven (11) and not more than fifteen (15). The Committee is the planning committee of the One Stop San Francisco and monitors the operations of the One Stop San Francisco. The Committee is also responsible for recommendations of Memoranda of Understanding with One Stop Partners as required by the

Workforce Investment Act and for the development of marketing strategies for One Stop San Francisco.

Ms. deCristofaro gave an overview of the Committee's accomplishments over the past year. The Committee convened fifteen meetings with a 100% record for achieving a quorum. The Committee also championed the development and launching of the One Stop Technology Project. They also developed the design of the organizational and management structure for the One Stop San Francisco and initiated ongoing Partner presentations. The Committee also sponsored a system-wide training for approximating 200 One Stop staff, partners and WISF Board Members.

Ms. deCristofaro introduced the three workgroups created by the One Stop Committee to focus on special projects: technology, marketing, and accessibility. The technology workgroup developed the One Stop Technology Project proposal. They successfully procured and secured a vendor for the development of and installment of a "swipe card" system for tracking services in the full service center and developed the next RFP for professional services to conduct an in-depth assessment of stakeholder systems, including their data collection, reporting practices, and technical capacity. The marketing workgroup conducted an assessment of current marketing activities and recommended an allocation of funds earmarked for the marketing of the System and Center(s). They proposed an adoption of a new identity for One Stop San Francisco and developed initial strategies intended to lead to the procurement of a marketing consultant. The accessibility workgroup clarified the mandate – universal services means access for all. They evaluated current accessibility for the disabled community to services, facilities, and programs; defined resource gaps for meeting accessibility needs related to equipment, training and facilities; and proposed contracting professional services to conduct a needs appraisal intended to make the full service center accessible to individuals in need of assisted technology.

Ms. deCristofaro presented the next steps of the Committee. The Committee will develop recommendations for funding of the System and the Centers. The Committee plans to continue partnership with the Employer Services Committee to develop and market business services delivered through the One Stop system. The Committee will compile a matrix of resources based on partner presentations and develop local policies regarding One Stop certification. The Committee will continue to sponsor leadership and other training for the Board, One Stop staff, and partners, and oversee the activities of the One Stop Committee workgroups.

Employer Services Committee Overview

Lucia Hughes presented an overview of the Employer Services Committee's roles and responsibilities, accomplishments, and next steps. After she introduced the members of the Committee, Ms. Hughes reviewed the Committee's bylaws. The Committee must maintain membership of not less than seven (7) and not more than eleven (11). The Committee focuses on San Francisco's changing industry and occupational structure; identifies sectors in the forefront of San Francisco's growth and assesses their workforce needs; and coordinates and plans delivery of business services. They also design methods and practices to engage employers in the public workforce development system and prepare recommendations to the Board concerning marketing and public relations of the workforce development system to employers.

The mission of the Committee is stated in its draft strategic plan: "to ensure that the San Francisco workforce development system is responsive to the needs of the employer community and is coordinated with the City's economic development efforts". In its plan, the

Committee stated its goals: develop and implement a coordinated employer services system; build more efficient and effective linkages between labor supply and demand; support and provide input to One Stop Committee on employer related marketing materials; and build employer services activities within the One Stop system.

Ms. Hughes gave an overview of the Committee's accomplishments since its appointment. The Committee has modified sections of the San Francisco Strategic Five-Year Plan that pertains to the scope and responsibilities of the Employer Services Committee. They spearheaded efforts to allocate dollars to fund the Customized Training Program and they sponsored two Employers' Forums.

The forums accomplished some of the goals of the Committee. The forums created a tighter linkage between the Board and the employer community; increased private sector awareness of the San Francisco public workforce development network; and created a baseline for subsequent discussion about the WISF employer engagement strategy and future forums. The forums also launched a Solution Map that provides a menu of employer services in the public workforce.

Ms. Hughes presented the next steps of the Committee. In 2003, the Committee plans to develop a policy framework to support a rapid turnaround Customized Training Program and a fee-for-service plan. The Committee also plans to sponsor another Employers' Forum. The Committee plans to partner with other WISF committees: identify employer-related research items for the Program Resources Committee, develop employer components of a marketing strategy and facilitate One Stop-based employer services with the One Stop Committee.

Announcements

Ms. deCristofaro announced that in February there will be a One Stop training by Greg Newton and invited both Committees to attend.

The Chairs of the Committees announced that they would coordinate with staff to schedule future joint meetings and, in the meantime, asked that staff provide a report of each committee's activities (i.e. a One Stop Committee reports to the Employer Services Committee and vice versa).

The Committees adjourned at 3:00 P.M.

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

Meeting Cancellation

Please note that the scheduled February 20, 2003 One Stop Committee Meeting has been cancelled.

A rescheduled date will be announced at a later date.

Thank you for your immediate attention to this matter.

If you have questions, contact Alice Chiu at (415) 923-4003.

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING OF THE

ONE STOP OPERATIONS AND SERVICES COMMITTEE WORKFORCE INVESTMENT SAN FRANCISCO BOARD

Date: Wednesday, March 19, 2003
Time: 1:00 p.m. – 3:00 p.m.
Location: Auditorium
Community College District Office
33 Gough Street
San Francisco CA 94103

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Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724 Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

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Issued: Wednesday, March 12, 2003

PROPOSED AGENDA
ONE STOP OPERATIONS AND SERVICES COMMITTEE OF THE WISF BOARD
WEDNESDAY, MARCH 19, 200

1. Welcome and Announcements
2. Adoption of the Agenda (*Action Item*)
3. Adoption of minutes from the meeting held on January 15, 2003 (*Action Item*)*
4. Public Testimony Agenda Items (Discussion Item)
5. PY' 2003 WIA Allocations and Proposed Strategic System Budget (*Discussion and Possible Action Item*)
6. Progress Reports (*Discussion and Possible Action Items*)
 - One Stop Accessibility Workgroup
 - One Stop Marketing Workgroup
 - One Stop Technology Project
7. Status Report - One Stop Operator Consortium's role regarding the One Stop Satellite Centers (*Discussion Item and Possible Action Item*)
 - Information requested from 3120 Mission Lessee, Dept. of Human Services
 - Clarification of "One Stop Operator" as defined by WIA legislation
8. Report on City College of San Francisco's status as a partner in the One Stop Center
9. Report on Greg Newton training and next steps (*Discussion and Possible Action*)
10. One Stop Partner/Program Presentations – Benefits Checkup Program - NCOA (*Information Item*)
11. Employer Services Committee Report (Information Item)
12. Public Testimony on Non-Agenda Items (Discussion Item)
13. Future Agenda Items (Discussion Item)
14. Future 2003 Meeting Schedule (Discussion Item)
15. Adjournment (*Action Item*)

*Information enclosed.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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DRAFT MINUTES OF THE
MARCH 19, 2003 MEETING OF THE

MAY 14 2003

ONE STOP COMMITTEE OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

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The meeting was held in the Auditorium of San Francisco Community College District Office located at 33 Gough Street in San Francisco, California 94103.

PRESENT:

Anita Aaron, William Allen, James Buick, Nicholas de Lorenzo, Devra Edelman, Phyllis McGuire, Craig Newmark, John Poremba, Victor Revenko, and Abby Snay

ABSENT:

Rosalie Bulach, Kathye Citron, and Darlene Rutkowski

STAFF:

Alice Chiu, Cathy deCristofaro, Lucia Hughes, Cedric Jackson, Roy Li, Emma Perez, Robert Schwab, and Adrian Trujillo

PUBLIC:

Youn Chey, Keith Kuo, Bernard Leung, Tony Lugo, Mark Mak, Vanessa Sacks, Eileen Tompkins, and Doug Yee

The meeting was convened at 1:00 P.M. with a quorum established.

Motion to adopt the agenda was made by Phyllis McGuire and seconded by John Poremba.

Ayes: Anita Aaron, William Allen, James Buick, Devra Edelman, Phyllis McGuire, Craig Newmark, John Poremba, Victor Revenko, and Abby Snay

Nays: None

Abstentions: None

Motion passed.

Motion to adopt the minutes of the January 15, 2003 meeting was made by John Poremba and seconded by William Allen.

Ayes: Anita Aaron, William Allen, James Buick, Devra Edelman, Phyllis McGuire, Craig Newmark, John Poremba, Victor Revenko, and Abby Snay

Nays: None

Abstentions: None

Motion passed.

Item 8 – City College of San Francisco (CCSF)

Phyllis McGuire gave a brief overview of CCSF's history with One Stop San Francisco and their current status as Partners. CCSF is a founding member of the Career Link and a full partner in the One Stop San Francisco. Since 1992, CCSF has been providing career assessment and career counseling services and resources to anyone in need, beginning with GAIN Program through JTPA and now WIA. CCSF has funded these activities with a budget averaging \$300,000 per year for staff, materials, and supplies. Ms. McGuire commented that CCSF have always provided their fair share and continue to contribute countless staff hours to the career center operations as needed. Through their career services, they assess and counsel over 400 customers per year.

Due to statewide budget crisis and funding cutbacks by the State Chancellor's Office, CCSF can no longer support the career services at the Career Link Center. CCSF proposed a fee-for-service contract with the local workforce board to fund CCSF's continued participations to provide career assessment and career counseling services. Without Workforce Investment Act funding, CCSF will cease operations at Career Link, 3120 Mission, on June 30, 2003.

As a mandated One Stop Partner, Ms. McGuire stated that CCSF would strive to keep some small presence at Career Link to inform customers of CCSF instructional opportunities, as is our mission as the major training provider in San Francisco.

Committee Discussion

William Allen asked if other Partners provide the services that CCSF provides and if there is a transition plan in process. Ms. McGuire replied that other Partners do provide some of the same services but not all. Roy Li, Career Link Center Manager, added that the services that other Partners provided are drop-in counseling, certain workshops, and assessments tests. He also added a transition plan would be developed by the Operations Committee once CCSF confirms their departure.

Jim Buick commented that some services provided at the Center are partnered and added that the Department of Human Services (DHS) provides services to those who are not on the caseload.

Public Testimony

Northern California Service League (NCSL)

Doug Lee commented that the Partners' presence at the Center adds value. CCSF's departure would defeat the purpose of "One Stop" – one location for access to all resources. He encouraged that the current structure be maintained because the Center is beneficial to the community and the training providers.

Arriba Juntos

Vanessa seconded Mr. Lee's comments and added that CCSF's services are invaluable.

Item 5 – One Stop Strategic Budget

Robert Schwab presented a brief overview of the recommendations.

Committee Discussion

John Poremba asked for clarification of the proposed recommendations. Mr. Schwab clarified that the recommendations were percentages instead of actual allocations because they are unknown. Anticipating a budget cut, the recommendations are for a baseline support for the One Stop. The One Stop would take the same hit as the system.

Mr. Poremba asked when does a decision have to be made. Mr. Schwab responded that the One Stop Committee is expected to present recommendations at the April 11th Executive Committee meeting.

Mr. Poremba asked what is the total cost to operate the Center. Tony Lugo answered more than \$9 million.

Mr. Buick amended the recommendations with the condition that if the allocation is more than 10% then the budget would be revisited. Craig Newmark seconded.

Public Testimony

Northern California Service League

Doug Lee expressed his concern whether or not each category is flexible.

Intercultural Institute of California

Youn Chey commented that the One Stop is important – provides a network for customers at one location – however, she questions the set aside costs (i.e. marketing) for the One Stop. Cathy deCristofaro responded that the set aside for marketing is moving forward with the Marketing workgroup.

Motion to adopt the recommendations with the proposed amendment was made by John Poremba and seconded by William Allen.

Ayes: William Allen, James Buick, Devra Edelman, Phyllis McGuire, Craig Newmark, John Poremba, and Victor Revenko

Nays: None

Abstentions: Anita Aaron, and Abby Snay

Motion passed.

Item 7 – Status Report

James Buick gave a brief report on the status of 3120 Mission Career Link Center and presented recommendations for the One Stop Operator.

Motion to adopt the recommendations was made by Victor Revenko and William Allen.

Ayes: Anita Aaron, William Allen, Devra Edelman, Phyllis McGuire, Craig Newmark, Victor Revenko, and Abby Snay

Nays: None

Abstentions: James Buick and John Poremba

Motion passed.

Item 11 – Employer Services Committee Update

Lucia Hughes reported that the Employer Services Committee adopted a customized training policy framework. Staff also reported Greg Newton's training and recommended some next steps for the Committee to take.

Acting Chair de Lorenzo asked if there were public testimony on non-agenda items.

Mr. de Lorenzo announced that the next meeting of the One Stop Committee will be April 16, 2003 from 1 to 3 PM.

Meeting adjourned at 3:05 P.M.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING OF THE

ONE STOP OPERATIONS AND SERVICES COMMITTEE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

DOCUMENTS DEPT.

MAY 14 2003

SAN FRANCISCO
PUBLIC LIBRARY

Date: Monday, May 19, 2003

Time: 1:00 p.m. – 3:00 p.m.

Location: Auditorium
Community College District Office
33 Gough Street
San Francisco CA 94103

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below and on the PIC's website, www.picsf.org.

AGENDA APPEARS ON THE REVERSE SIDE

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Issued: Monday, May 12, 2003

**PROPOSED AGENDA
ONE STOP OPERATIONS AND SERVICES COMMITTEE OF THE WISF BOARD
MONDAY, MAY 19, 200**

1. Welcome and Announcements
2. Adoption of the Agenda (*Action Item*)
3. Adoption of minutes from the meeting held on March 19, 2003 (*Action Item*)*
4. Public Testimony Agenda Items (Discussion Item)
5. Status Report from One Stop Consortium Operator (Discussion Item)
6. Progress Reports (*Discussion and Possible Action Items*)
 - One Stop Accessibility Workgroup – Report and Recommendations*
 - One Stop Technology Project – Technology Project Update*
 - One Stop Marketing Workgroup – Status Report and Next Steps
7. One Stop Partner Presentations (Information Item)
 - City College of San Francisco
8. Employer Services Committee Report (Information Item)
9. Public Testimony on Non-Agenda Items (Discussion Item)
10. Future Meeting Schedule and Agenda Items (Discussion Item)
11. Adjournment (*Action Item*)

*Information enclosed.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: ROSALIE BULACH
CHAIR, ONE STOP COMMITTEE

DATE: MAY 12, 2002

FROM: PAMELA S. CALLOWAY
CHIEF OF STAFF

SUBJECT: ONE STOP TECHNOLOGY WORKGROUP REPORT ON TECHNOLOGY
DESIGN PROJECT STATUS REPORT (AGENDA ITEM 6)

Since retaining CompuMentor in early March 2003, significant work has been completed on the Technology Project to review, assess, plan and provide design recommendations for information systems intending to meet the needs and requirements of the One Stop San Francisco System. The following report provides a summary of the project to date.

WORK COMPLETED BY COMPUMENTOR DURING APRIL 2003

CompuMentor developed and delivered a presentation to One Stop partner agencies in the Kick-off Meeting on April 3rd. The presentation covered the anticipated scope of the project and the methodology expected to be followed. The PowerPoint and notes were later made available to all WISF Board Members, One Stop Partners, the Committee of Contracting Agencies, and other One Stop representatives. Attendees at the presentation seemed positive about the project and enthusiastic to see movement toward a comprehensive system. Concerns about system commitment, confidentiality and administrative burdens on the agencies were raised as anticipated.

A survey was developed as a tool to determine information about the technology capacity, existing tracking/reporting systems and needs of each organization. The PIC mailed the survey to partner agencies on April 9 and responses were due back on April 18. CompuMentor staff followed up with all partner contacts and sent electronic versions when requested. To date, only 25 responses have been received out of a total of 90 surveys that were sent. CompuMentor continues to follow up with the agencies.

Thus far, eight (8) of the thirteen (13) mandatory One Stop partners have yet to respond. If more than half of the mandatory partners do not respond to the survey another strategy may be needed to engage more participation from stakeholders. This may be a matter for discussion. CompuMentor will devote one more week of survey follow-up before beginning to compile responses and moving on to the next phase.

Research has been started on the swipe card system in place at the full service Center. One of CompuMentor's database specialists has been conducting a detailed review of materials provided by the PIC and will be arranging interviews and site visits. This information will be

used to help estimate costs for implementing swipe cards throughout San Francisco and to ensure integration issues are addressed in any future recommendations.

CompuMentor has also begun researching systems in use in other cities and counties. Although the research cannot be completely comprehensive, it is expected to provide information that will guide the drafting of a local budget, provide information on existing systems that may meet System needs, and provide pointers for successful implementation strategies. According to CompuMentor, only one major supplier of full service systems has identified. This lack of competition may be due to the excellence of the product or simply to a lack of options and investment; further research is required. The PIC staff has also provided and will further assist in providing gathered information on other systems.

WORK ANTICIPATED IN THE UPCOMING MONTH

- CompuMentor will finish data collection and analysis of survey.
- CompuMentor will continue research on swipe card system, including site visits and interviews.
- CompuMentor will continue research with other counties using a comprehensive One Stop system.
- CompuMentor will provide an initial budget.
- CompuMentor will identify Advisory Committee members and begin preparations for first meetings.

CHALLENGES AND ISSUES

The changing environment around One Stop San Francisco and the PIC's role around this project (i.e., changing database system, to be provided by Department of Labor) may affect the project. The PIC and CompuMentor should remain cognizant of these issues throughout the project.

CompuMentor also believes that a lack of definitive information on partner agencies and their roles has caused significant difficulties in completing the survey. CompuMentor has been unable to develop an unduplicated list of agencies, main contact for each and One Stop status (e.g. mandatory partner, access point) from the information received. This will increase the amount of time CompuMentor must spend on obtaining information from agencies, and has made analysis of information less reliable. The PIC has provided as much information as possible, but it is difficult for some partners to understand their role as partners in the One Stop System as this has never been clearly defined. This ongoing issue is part of the complex nature of a One Stop system.

If you have questions about this information, please contact Emma Perez at 923-4267, eperez@picsf.org, or Cathy deCristofaro, 431-8700, cathy@picsf.org. Staff will also be available at the meeting.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: Rosalie Bulach, Chair
One Stop Committee of the WISF Board

DATE: May 12, 2003

FROM: Darlene Rutkowski, Chair
One Stop Accessibility Workgroup

SUBJECT: Proposed Steps to Take to Bring the Career Link Center - Mission into Compliance for Service to Individuals with Disabilities (AGENDA ITEM 6)

The One Stop Operations and Services Committee is asked to review the following report from the One Stop Accessibility Workgroup that provides recommended steps for creating a compliant and accessible comprehensive One Stop Center.

BACKGROUND

For the past ten months, the One Stop Accessibility Workgroup has continued to meet on a regular basis to develop a proposal, including recommendations, to ensure that the Career Link Center – Mission is accessible to individuals with disabilities.

The Work group consists of the following individuals and their respective agencies:

- George Clark, Rose Resnick Lighthouse for the Blind/Visually Impaired
- Steve Crabiell, Toolworks
- John Weber and Herb Levine, Independent Living Resource Center
- Roy Li, Manager, Career Link Center - Mission
- Shawishi Monroe, Employment Development Department
- Sara Murphy, WorkLink
- Susan Pender, San Francisco Vocational Services
- Darlene Rutkowski, State Department of Rehabilitation (DOR)
- Ken Stein, SF Mayor's Office on Disability

PROPOSAL

STEPS TO TAKE TO ENSURE THAT THE CAREER LINK CENTER – MISSION IS ACCESSIBLE TO INDIVIDUALS WITH DISABILITIES (May 18, 2003)

This proposal will address the following areas: Training and Physical Access, Program Access and Funding Needs.

1.) TRAINING:

This workgroup is recommending that Disability Awareness training be required for all staff co-located at the Career Link Center – Mission. It is recommended that this training, provided at no-cost, be arranged on an annual basis with the State Department of Rehabilitation (DOR), Disability Access Section, by the manager of the Career Link Center – Mission.

As new staff, who are co-located at the Career Link Center – Mission, are hired by the above agencies throughout the year, it is recommended that a video which discusses Disability Awareness and Reasonable Accommodations for individuals with disabilities be purchased and be required for staff to view as part of their new employee orientation. The manager of the Career Link Center – Mission will be provided with an orientation binder that will contain basic information regarding customer service and disability related issues and resources (e.g., on-line disability awareness training/objectives checklist). A checklist will be used to ensure that new staff has a basic understanding of this information. The members of this workgroup are open to working with the manager of the Career Link Center – Mission to develop this checklist.

On a quarterly basis, members of the following agencies will offer Disability Awareness training on a rotational basis for newly hired staff who are co-located at the Career Link Center – Mission: DOR, Rose Resnick Lighthouse for the Blind/Visually Impaired, ILRC, Worklink, SFVS, Toolworks and SF Mayor's Office on Disability.

Once a year, this workgroup is recommending that a Resource Fair occur at the Career Link Center – Mission for all partners who are co-located at this site, plus other interested community-based organizations and One Stop Access Point staff who provide services to individuals with disabilities,

to gain insight into the organizations and community services available for individuals with disabilities, network with each other and share resources. This workbook is recommending that the first fair occur in June 2003.

2.) **PHYSICAL AND PROGRAM ACCESS/FUNDING NEEDS:**

To assist in making this site accessible (physical/program) to individuals with disabilities, various data has been gathered. Refer to the following information, which outlines the needs in this area:

Item	Price	Suggested Vendor
New computer system with large monitor, flatbed scanner, printer, and MS Office	\$2,500 (approximate max.) Sample specs and quote can be provided.	Dell Computers
DBH Motorized adjustable-height table	\$950 (\$825 + \$125 shipping)	Access Ingenuity
Adjustable keyboard mechanism and tray	\$150	Express Computer Products
BigKeys LX Keyboard	\$148	Access Ingenuity
Large Print keyboard	\$110	Access Ingenuity
ZoomText Level 2	\$545	Access Ingenuity
ERGO 17" color CCTV with rolling stand	\$2795 + \$60 shipping (Black and white only with two-tone color options is approx. \$500 less)	Access Ingenuity
JAWS screen reading software	Pro Version for Windows 2000, XP and older, \$1145	Access Ingenuity
Scan & Read Pro	\$160	Premier Programming
WYNN Wizard 3.1	\$1075 (includes Epson 1250 flatbed scanner)	Access Ingenuity
BigShot Screen magnification on second, non-low vision computer and on other selected stations	$\$92.50 \times 2 = \185	Access Ingenuity

textHelp ScreenReader on other selected stations	\$40 x 2 = \$80	Access Ingenuity
Headset/speaker switch	\$50 (\$25x2)	Various
Dual Keyboard Adapter	\$65	Infogrip
Miscellaneous shipping	\$150	
Installation, 4 hrs @ \$85	\$340	Access Ingenuity
Staff training, 2 sessions @ \$295	\$590	Access Ingenuity
Kensington Trackball mouse (if not on site or functional)	\$105	Various
TextHelp Read and Write (for possible later inclusion)	\$285	Access Ingenuity
<u>Additional Williams FM Receivers</u>	\$145 ea X 2 = \$290	Access Ingenuity
Open Book Scan and Read software	\$950	Access Ingenuity
Video on Disability Awareness/Reasonable Accommodations	\$500	One Stop Accessibility WorkGroup will identify vendor
Update brochure for Career Link Center – Mission (to include handicap logo)	\$500	Same vendor used to print initial batch of current brochures
Miscellaneous signage/materials (portion)	\$1,272	Rose Resnick Lighthouse for the Blind/Visually Impaired
Subtotal	\$15,000	
Interpreting costs for customers who are deaf	\$55/hour	Arranged and paid for by EDD
Career Link Center – Mission (Brochure in Braille – large print can be made using a copy machine) – remainder	\$300	CA Prison Industries or Volunteers of Vacaville
Grant Writer	\$5,000 to write a proposal for a small grant - \$10,000 to write a proposal for a large grant	Contract out to local grant writers or designate a member of SF PIC to write grant(s)

Signage throughout building (Braille) – remainder	??	??
Counters (2) – Information Counter and Service Counter) – in meantime, have sign -in log on a clipboard within reach of all customers at Information Counter	??	??
Latch side clearance in childcare room	??	??
Literature placement throughout center (racks that are accessible to individuals with disabilities) – remainder	??	??
GRAND TOTAL	??	

(Please note: the following ADA issues that have been brought into compliance at the Career Link Center – Mission as of this date.)

1. Automatic Door Installed at entrance
2. Automatic Door installed in women's staff bathroom
3. Bathroom doors adjusted
4. Handicap parking (2 spots available for customers)
5. Water fountain bars added
6. Telephones have volume controls
7. ISA Symbol (entrance of building)

Planned Projects:

1. Automatic bathroom doors to be installed in public/staff bathrooms (if pressure cannot be adjusted to 5 pounds or less)

Projects that need to be completed by the Department of Public Works:

Walks and sidewalks
Curb ramps

Projects that need to be completed by the landlord at Career Link Center – Mission:

1. Doors/emergency staff and public (current hardware requires pinching and twisting) – latch type handle required under the ADA
2. Second water fountain added/wheelchair accessible for staff and the public
3. Restrooms
4. Emergency Exit Ramp/Stairway – recommend having Fire Department check out (an option might be the purchase of an evacuation emergency chair)

For more information, please refer to Accessibility Checklist, posted on the EDD web site, which highlights federal mandates (State mandates are much more strict). Compliance according to this checklist satisfies EDD and requirements of WIA funding. There is also an excellent web site by the National Center on Workforce & Disability/Adults at www.onestops.info, which lists excellent information on making One Stop Centers accessible to individuals with disabilities.

Thank you for your commitment to ensuring that the SF One Stop System, beginning with the Career Link Center – Mission, is accessible to individuals with disabilities. It is required that a transition plan be developed to bring all areas of non-compliance into compliance, including a cost analysis and time line. Please contact me at (415) 904-7151 or drutkows@dor.ca.gov to let me know if you have further questions or need additional information.

Attachments (Accessibility Checklist/Completed ADA Site Survey)

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING OF THE

ONE STOP OPERATIONS AND SERVICES COMMITTEE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

DOCUMENTS DEPT.

Date: Monday, June 16, 2003

Time: 1:00 p.m. – 3:00 p.m.

Location: Auditorium
Community College District Office
33 Gough Street
San Francisco CA 94103

JUN 11 2003

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415-554-7724 Fax: 415-554-5163
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Issued: Monday, June 9, 2003

PROPOSED AGENDA
ONE STOP OPERATIONS AND SERVICES COMMITTEE OF THE WISF BOARD
MONDAY, JUNE 16, 2000

1. Welcome and Announcements
2. Adoption of the Agenda (*Action Item*)
3. Adoption of minutes from the meeting held on May 19, 2003 (*Action Item*)*
4. Public Testimony Agenda Items (Discussion Item)
5. Budget Projections 2003 – 2004 (*Discussion and Possible Action Item*)
 - Consortium Operator - *One Stop Career Centers*
 - Staff – *One Stop System*
6. Progress Reports (*Discussion and Possible Action Items*)
 - One Stop Technology Project – *Status report*
 - One Stop Marketing Workgroup – *Design criteria for marketing services solicitation*
7. One Stop Partner Presentations (Information Item)
 - Employment Development Department
8. Public Testimony on Non-Agenda Items (Discussion Item)
9. Future Meeting Schedule and Agenda Items (Discussion Item)
10. Adjournment (*Action Item*)

* Information enclosed.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

Meeting Cancellation

Please note that the scheduled July 21st One Stop Committee Meeting has been cancelled.

The next One Stop Committee Meeting is August 18th from 1 PM to 3 PM at 33 Gough Street Auditorium.

Thank you for your immediate attention to this matter.

DOCUMENTS DEPT.

JUL 16 2003

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING OF THE

ONE STOP OPERATIONS AND SERVICES COMMITTEE WORKFORCE INVESTMENT SAN FRANCISCO BOARD

DOCUMENTS DEPT.

AUG 12 2003

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Date: Monday, August 18, 2003

Time: 1:00 p.m. – 3:00 p.m.

Location: Auditorium
Community College District Office
33 Gough Street
San Francisco CA 94103

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Issued: Monday, August 11, 2003

PROPOSED AGENDA
ONE STOP OPERATIONS AND SERVICES COMMITTEE OF THE WISF BOARD
Monday, August 18, 2003

1. Welcome and Announcements
2. Adoption of the Agenda (*Action Item*)
3. Adoption of minutes from the meeting held on June 16, 2003 (*Action Item*)*
4. Public Testimony Agenda Items (Discussion Item)
5. WISF Board Retreat (*Discussion and Possible Action Item*)*
6. Status Reports on One Stop System Projects (*Discussion and Possible Action Item*)
 - One Stop Technology Project
 - One Stop Marketing Workgroup
7. Public Testimony on Non-Agenda Items (Discussion Item)
8. Future Meeting Schedule and Agenda Items (Discussion Item)
9. Adjournment (*Action Item*)

* Information enclosed.

Workforce Investment San Francisco

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: ROSALIE BULACH
CHAIR, ONE STOP COMMITTEE

DATE: AUGUST 11, 2003

FROM: PAMELA S. CALLOWAY, CHIEF OF STAFF

SUBJECT: WISF BOARD RETREAT AND RESULTS STATUS

The intent of this memo is to inform the One Stop Committee on the status of a summary report from the recent WISF Board Retreat, held on Friday, August 1, 2003. The Retreat facilitators and members of the WISF staff are currently compiling all of the data collected throughout the day of the Retreat and are preparing a synthesis of each exercise, as well as an analysis of the process overall. Additionally, all Retreat participants were recently sent a survey, the results of which will also be used to evaluate the event.

In order to inform the One Stop Committee's discussion concerning the Retreat, and to provide context for those One Stop Committee members who were unable to attend, the following materials from the Retreat have been attached for your review:

- Working Definitions and Core Concepts
- One Stop Elements
- Excerpts from Workforce Investment Act, specific to One Stop
- Excerpts from WISF Board bylaws on Committee roles

Given goals for the Retreat that sought to simplify language and clarify definitions for a system that is immense in both its scope and complexity, the Board accomplished a great deal at the Retreat. To acknowledge their contribution, Lynn Bunim and I recently sent a letter thanking all attending Board and Committee members. Summarizing both the goals and accomplishments of the Retreat, the letter is submitted to you in lieu of the final report, which will be provided at a later date. I look forward to the continued involvement of the One Stop Committee as we move forward.

As always, staff will be available at the meeting to address your question and concerns.

Working Definitions and Concepts

“Workforce Development System”

The entire universe of programs, resources and activities—including those provided by public entities, businesses, labor organizations, educational institutions and community-based organizations—that seek to prepare individuals to enter and advance in the workforce.

“Economic Development Activities”

The entire universe of programs, resources and activities that seek to attract new businesses to San Francisco and the surrounding region and help existing businesses remain vital and grow.

“One Stop System”

The One Stop system represents a *subset* of workforce development and economic development programs, resources and activities that are coordinated and/or integrated for the purpose of achieving better employment and advancement outcomes for more people, more effective human resource outcomes for employers, and better linkages between the two.

“One Stop Center”

Intended to be an entry point into the System for many clients, a One Stop Center is a physical place where core services (job search and placement assistance, labor market information, initial assessment of skills and needs) are provided to job and advancement seekers on-site, and where information about and *access to* all publicly subsidized job training, education and placement services is available. A One Stop Center is also a place in which employers can list job openings, and receive assistance with employee recruitment and access to upgrade training for their incumbent workforce. All clients of the Center should be able to *access* the full range of programs, resources and activities available in the One Stop System through resources available at the One Stop Center. WIA requires that there be at least one certified, comprehensive One Stop Center in each local workforce area.

“One Stop System Access Point”

Access Points are organizations that provide all or some combination of *direct services* to One-Stop System customers *and* that provide access to other job training, education, employment and supportive services resources within the San Francisco One Stop System through referrals and information made readily available to all upon request.

PRINCIPLES AND ELEMENTS OF SAN FRANCISCO'S ONE-STOP SYSTEM

Below is a matrix of One Stop principles, each containing "elements" currently relevant to San Francisco's One Stop System, as identified in recent interviews and focus groups. *This is not a comprehensive list of all the potential principles or elements of the system, rather it is a subset of issues for this retreat.*

STREAMLINED, COORDINATED, INTEGRATED SERVICES

ELEMENT ONE: SHARED INTAKE AND CUSTOMER TRACKING SYSTEM (SWIPE CARD)

This would be a common a system —paper and/or electronic—for collecting One Stop customer information at the point of initial intake. Ideally this eliminates the need to collect the same data at multiple One Stop system programs while providing valuable demographic information on the One Stop customers and the services they use. After the initial intake process, the swipe card system automates the ongoing collection and storage of customer flow data, tracking services received at different points throughout the system. The swipe card system also generates reports for management and policy makers with information about the volume and frequency of the services, potentially satisfying multiple reporting needs, eliminating duplicate data collection and entry, and populating other agency databases as necessary. Currently, the Swipe Card/Intake system functions at the three One-Stop Center sites only.

ELEMENT TWO: SHARED ASSESSMENT/TESTING TOOLS

This element includes the use of some common assessment tools at various One Stop Centers and Access Points, the location of some testing and assessment capacity at One Stop Centers that would be used by clients receiving services in Access Points, and the capacity to share assessment results among One Stop system Centers and Access Points.

MARKETING / OUTREACH

ELEMENT THREE: MARKETING

A well-coordinated effort which builds public awareness and informs the community, including individuals and businesses, of the existence and availability of the services and resources of the One Stop system, and promotes the system as a whole. One-Stop marketing is currently developing strategy and corporate identity. The next step consists of launching a marketing and publicity campaign targeting employers, and people seeking employment and advancement. Campaign collateral may include brochures, postcards, business cards, stationary, print ads, TV and radio ads, billboards, bus stop shelters, and other media.

BUSINESS SERVICES AND ENGAGEMENT

ELEMENT FOUR: BUSINESS SERVICES

Some services would appeal to a broad range of businesses, for example orientation to the One Stop system; an opportunity to post job openings; automated Job Match services; links to Labor Market Information, other relevant research, regulations or laws; tax credit assistance; and general education and training information. Other services would be more customized, for example creation of a customized training program; pre-screening of job candidates; or out-sourced staffing functions. All One Stop system Business Services would be accessible through the One Stop Center, some business services would be accessible through various One Stop Access Points.

INFORMED CUSTOMER CHOICE AND UNIVERSAL ACCESS

ELEMENT FIVE: "DIRECTORY" OF INFORMATION ENABLING REFERRALS

Whether on paper, online, or via a database, this "directory" would provide comprehensive and up-to-date information about all job-search services, employment and training programs, and relevant public benefits and support services available in San Francisco for individuals seeking education, training, employment or advancement. The information could include program descriptions, eligibility and enrollment information, and program performance data. Information would be directly available to any person seeking services and be a resource for staff at One-Stop Centers and Access Point agencies. Elements of this "Directory" currently exist, in dispersed resources.

ELEMENT SIX: THE ONE STOP CENTER

Intended to be an entry point into the System for many clients, a One Stop Center is a physical place where core services (job search and placement assistance, labor market information, initial assessment of skills and needs) are provided to job and advancement seekers on-site, and where information about and access to all publicly funded subsidized job training, education and placement services is available. A One Stop Center is also a place in which businesses can list job openings, and receive assistance with employee recruitment and access to upgrade training for their incumbent workforce. All clients of the Center should be able to access the full range of programs, resources and activities available in the One Stop System through resources available at the One Stop Center.

STATUTORY PROVISION AND FEDERAL REGULATIONS RELATED TO
THE ONE-STOP SYSTEM
WITH ANNOTATIONS

EXCERPTED FROM

A GUIDE TO THE WORKFORCE INVESTMENT ACT OF 1998
(P.L. 105 -220)

BY MICHAEL BRUSTEIN, ESQ., AND ROBERT KNIGHT
OF THE
NATIONAL ASSOCIATION OF PRIVATE INDUSTRY COUNCILS
NOW CALLED
THE NATIONAL ASSOCIATION OF WORKFORCE INVESTMENT BOARDS
AND
THE ONE STOP GUIDE TO THE FINAL REGULATIONS
(20 CFR PART 652, ET AL.)
BY MICHAEL BAUSTEIN, ESQ., AND JENNIFER M VASTA, ESQ.

I. Background

A. WIA Principles

WIA reforms Federal job training programs and creates a new, comprehensive workforce investment system. The reformed system is intended to be customer-focused, to help Americans access the tools they need to manage their careers through information and high quality services, and to help US companies find skilled workers. This new law embodies seven key principles. They are:

- Streamlining services through better integration at the street level in the One-Stop delivery system. Programs and providers will co-locate, coordinate and integrate activities and information, so that the system as a whole is coherent and accessible for individuals and businesses alike.
- Empowering individuals
- Universal access
- Increased accountability
- Strong role for local workforce investment boards and the private sector, with local, business-led boards acting as "boards of directors," focusing on strategic planning, policy development and oversight of the local workforce investment system.
- State and local flexibility
- Improved youth programs

We wish to emphasize that DOL considers the reforms embodied in the Workforce Investment Act to be pivotal, and not "business as usual." This legislation provides an unprecedented opportunity for major reforms that can result in a reinvigorated, integrated workforce investment system. States and local communities, together with business, labor, community-based organizations, educational institutions, and other partners, must seize this historic opportunity by thinking expansively as they design a customer-focused, comprehensive delivery system.

The cornerstone of the new workforce investment system is One-Stop service delivery which unifies numerous training, education and employment programs into a single, customer-friendly system in each community. The underlying notion of One-Stop is the coordination of programs, services and governance structures so that the customer has access to a seamless system of workforce investment services. We envision that a variety of programs could use common intake, case management and job development systems in order to take full advantage of the One-Stops' potential for efficiency and effectiveness. A wide range of services from a variety of training and employment programs will be available to meet the needs of employers and job seekers. The challenge in making One-Stop live up to its potential is to make sure that the State and Local Boards can effectively coordinate and collaborate with the network of other service agencies, including TANF agencies, transportation agencies and providers, metropolitan planning organizations, child care agencies, nonprofit and community partners, and the broad range of partners who work with youth. (20 CFR Part 652)

Key to the development of the system is collaboration among partners to create a seamless system of service delivery. Individuals may gain access to this seamless system through a variety of ways, as is discussed below. However, local areas are required to establish at least one comprehensive physical center in their area that will provide access to core services and additional information from the required partner programs.

If an individual seeks assistance from an affiliated site or from an individual partner program, they should be served and also receive information about how and where they may obtain other services available through the one-stop system. The Department of Labor is advocating a common sense approach to ensuring that individual are served regardless of their first contact with the education and workforce development community. This is consistent with the "no wrong door" approach set forth in the Act.

The key to establishing an effective local system that serves both participants and employers is to develop effective linkages between the partners and the sites operating within the system. While the WIA only requires one physical site and the participation of certain partners, the goal of the legislation is to create a system that encompasses all of the various programs and providers in the community.

ESTABLISHMENT OF ONE-STOP DELIVERY SYSTEM [SECTION 134(c)(1)]

Section 134(c) sets out the framework for the one-stop delivery system. Each state that receives an allotment to operate a workforce investment system must establish a one-stop delivery system. This one-stop delivery system must provide specified core services to everyone and it must provide access to specified intensive services and to training services to those who need such assistance within a system of priority setting that is described below.

In general, each state and workforce area must provide access through its one-stop system to:
Core services, intensive services, and training services, including serving as the point of access

- To individual training accounts for training services;
- Any discretionary (permissible) services available through the one-stop system, such as customized screening and referral, as outlined in subsection (e) below;
- Provide access to programs and activities carried out by one-stop partners; and
- Provide access to information available under the Wagner-Peyser Act and all job search, placement, recruitment, and other labor exchange services authorized under Wagner-Peyser.

ACT

(c) ESTABLISHMENT OF ONE-STOP DELIVERY SYSTEM. –

(1) IN GENERAL. – There shall be established in a State that receives an allotment under section 132(b) a one-stop delivery system, which –

(A) shall provide the core services described in subsection (d)(2);

(B) shall provide access to intensive services and training services as described in paragraphs (3) and (4) of subsection

(d), including serving as the point of access to individual training accounts for training services to participants in accordance with subsection (d)(4)(G);

(C) shall provide access to the activities carried out under subsection (e), if any;

(D) shall provide access to programs and activities carried out by one-stop partners and described in section 121(b); and

(E) shall provide access to the information described in section 15 of the Wagner-Peyser Act and all job search, placement, recruitment, and other labor exchange services authorized under the Wagner-Peyser Act (29 U.S.C. 49 et seq.).

REGS

STRUCTURE OF THE ONE-STOP DELIVERY SYSTEM [Section 134 (c)(2)]

The one-stop delivery system must provide core services and provide access to the other services outlined above at not less than one physical center in each local area of the state. The one-stop delivery system may also make program services and activities available through a network of eligible one-stop partners that can provide one or more of the programs and services to individuals and is accessible at an affiliated site that consists of a physical location or an electronically and technologically advanced access point.

Nonetheless, the one-stop system must assure individuals that information on the availability of the core services will be available regardless of where the individuals initially entered the statewide workforce investment system. The one-stop delivery system must be based on a "no wrong door" approach that will assure customers that information on the availability of all the core services will be available regardless of where the individuals initially enter the system.

ACT

(2) ONE-STOP DELIVERY. – At a minimum, the one-stop delivery system –

(A) shall make each of the programs, services, and activities described in paragraph (1) accessible at not less than one physical center in each local area of the State; and

(B) may also make programs, services, and activities described in paragraph (1) available –

(i) through a network of affiliated sites that can provide one or more of the programs, services, and activities to individuals; and

(ii) through a network of eligible one-stop partners –

(I) in which each partner provides one or more of the programs, services, and activities to such individuals and is accessible at an affiliated site that consists of a physical location or an electronically or technologically linked access point; and

(II) that assures individuals that information on the availability of the core services will be available regardless of where the individuals initially enter the statewide workforce investment system, including information made available through an access point described in subclause (I).

(3) SPECIALIZED CENTERS. – The centers and sites described in paragraph (2) may have a specialization in addressing special needs, such as the needs of dislocated workers.

REGS**SEC. 662.100 WHAT IS THE ONE-STOP DELIVERY SYSTEM?**

(a) In general, the One-Stop delivery system is a system under which entities responsible for administering separate workforce investment, educational, and other human resource programs and funding streams (referred to as One-Stop partners) collaborate to create a seamless system of service delivery that will enhance access to the programs' services and improve long-term employment outcomes for individuals receiving assistance.

(b) Title I of WIA assigns responsibilities at the local, State and Federal level to ensure the creation and maintenance of a One-Stop delivery system that enhances the range and quality of workforce development services that are accessible to individuals seeking assistance.

(c) The system must include at least one comprehensive physical center in each local area that must provide the core services specified in WIA section 134(d)(2), and must provide access to other programs and activities carried out by the One-Stop partners.

(d) While each local area must have at least one comprehensive center (and may have additional comprehensive centers), WIA section 134 (c) allows for arrangements to supplement the center. These arrangements may include:

(1) A network of affiliated sites that can provide one or more partners' programs, services and activities at each site;

(2) A network of One-Stop partners through which each partner provides services that are linked, physically or technologically, to an affiliated site that assures individuals are provided information on the availability of core services in the local area; and

	<p>(3) Specialized centers that address specific needs, such as those of dislocated workers.</p> <p>(e) The design of the local area's One-Stop delivery system, including the number of comprehensive centers and the supplementary arrangements, must be described in the local plan and be consistent with the Memorandum of Understanding executed with the One-Stop partners.</p>
<p>REQUIRED LOCAL EMPLOYMENT AND TRAINING ACTIVITIES [SECTION 134(D)]</p> <p>Funds allocated to the local workforce area for adults and for dislocated workers must be used for four purposes:</p> <ol style="list-style-type: none"> 1. Establish the one-stop delivery system; 2. Provide the core services through these one-stop systems to adult and dislocated workers; 3. Provide the intensive services to adults and dislocated workers; and 4. Provide training services for adults and dislocated workers. <p>While funding for dislocated workers is independent, dislocated workers are eligible for the same services available to the adult pool through the one-stop system. The Act provides for three levels of services: core services, intensive services, and training. The "work first" approach of the Act promotes work by assuring that the most job-ready individuals use up-front core services before accessing more intensive services or skills training.</p>	
<p style="text-align: center;">ACT</p> <p>(d) REQUIRED LOCAL EMPLOYMENT AND TRAINING ACTIVITIES. –</p> <p>(1) IN GENERAL. –</p> <p>(A) ALLOCATED FUNDS. – Funds allocated to a local area for adults under paragraph (2)(A) or (3), as appropriate, of section 133(b), and funds allocated to the local area for dislocated workers under section 133(b)(2)(B), shall be used –</p> <p>(i) to establish a one-stop delivery system described in subsection (c);</p> <p>(ii) to provide the core services described in paragraph (2) to adults and dislocated workers, respectively, through the one-stop delivery system in accordance with such paragraph;</p> <p>(iii) to provide the intensive services described in paragraph (3) to adults and dislocated workers, respectively, described in such paragraph; and</p> <p>(iv) to provide training services described in paragraph (4) to adults and dislocated workers, respectively, described in such paragraph.</p> <p>(B) OTHER FUNDS. – A portion of the funds made available under Federal law authorizing the programs and activities described in section 121(b)(1)(B), including the Wagner-Peyser Act (29 U.S.C. 49 et seq.), shall be used as described in <i>clauses (i) and (ii) of subparagraph (A)</i>, to the extent not inconsistent with the Federal law involved.</p>	<p style="text-align: center;">REGS</p> <p>SEC. 662.260 WHAT SERVICES, IN ADDITION TO THE APPLICABLE CORE SERVICES, ARE TO BE PROVIDED BY ONE-STOP PARTNERS THROUGH THE ONE-STOP DELIVERY SYSTEM?</p> <p>In addition to the provision of core services, One-Stop partners must provide access to the other activities and programs carried out under the partner's authorizing laws. The access to these services must be described in the local MOU. 20 CFR part 663 describes the specific requirements relating to the provision of core, intensive, and training services through the One-Stop system that apply to the adult and the dislocated worker programs authorized under title I of WIA. Additional requirements apply to the provision of all labor exchange services under the Wagner-Peyser Act. (WIA sec. 134(c)(1)(D).)</p>

CORE SERVICES [SECTION 134(d)(2)]

Core services at the one-stop system are available to everyone, and are to be provided by one-stop partners.

Core services include:

1. Determinations of whether the individuals are eligible to receive assistance;
2. Outreach, intake, and orientation to the information;
3. Initial assessment of skill levels, aptitudes, abilities, and supportive service needs;
4. Job search and placement assistance, and, where appropriate, career counseling;
5. Provision of employment statistics information, including the provision of accurate information leading to local, regional, and national labor market areas;
6. Provision of performance information and program cost information on eligible providers of training services, eligible providers of youth activities, providers of adult education activities, providers of postsecondary vocational education activities, and providers of vocational rehabilitation program activities;
7. Provision of information regarding how the local areas are performing on local performance measures;
8. Provision of accurate information relating to the availability of supportive services, including child care and transportation;
9. Provision of information regarding filing claims for unemployment compensation;
10. Assistance in establishing eligibility for welfare-to-work activities and programs of financial aid for training and education that are not funded under the Act; and
11. Follow up services for participants who are placed in unsubsidized employment for not less than 12 months.

ACT

(2) CORE SERVICES. – Funds described in paragraph (1)(A) shall be used to provide core services, which shall be available to individuals who are adults or dislocated workers through the one-stop delivery system and shall, at a minimum, include –

(A) determinations of whether the individuals are eligible to receive assistance under this subtitle;

(B) outreach, intake (which may include worker profiling), and orientation to the information and other services available through the one-stop delivery system;

(C) initial assessment of skill levels, aptitudes, abilities, and supportive service needs;

(D) job search and placement assistance, and where appropriate, career counseling;

(E) provision of employment statistics information, including the provision of accurate information relating to local, regional, and national labor market areas, including –

(i) job vacancy listings in such labor market areas;

(ii) information on job skills necessary to obtain the jobs described in clause (i); and
(iii) information relating to local occupations in demand and the earnings and skill requirements for such occupations; and

(F) provision of performance information and program cost information on eligible providers of training services as described in section 122, provided by program, and eligible providers of youth activities described in section 123, providers of adult education described in title II, providers of postsecondary vocational education activities and vocational education activities available to school

REGS**SEC. 662.240 WHAT ARE A PROGRAM'S APPLICABLE CORE SERVICES?**

(a) The core services applicable to any One-Stop partner program are those services described in paragraph (b) of this section, that are authorized and provided under the partner's program.

(b) The core services identified in section 134(d)(2) of the WIA are:

(1) Determinations of whether the individuals are eligible to receive assistance under subtitle B of title I of WIA;

(2) Outreach, intake (which may include worker profiling), and orientation to the information and other services available through the One-Stop delivery system;

(3) Initial assessment of skill levels, aptitudes, abilities, and supportive service needs;

(4) Job search and placement assistance, and where appropriate, career counseling;

(5) Provision of employment statistics information, including the provision of accurate information relating to local, regional, and national labor market areas, including—

(i) Job vacancy listings in such labor market areas;

(ii) Information on job skills necessary to obtain the listed jobs; and

dropouts under the Carl D. Perkins Vocational and Applied Technology Education Act (20 U.S.C. 2301 et seq.), and providers of vocational rehabilitation program activities described in title I of the Rehabilitation Act of 1973 (29 U.S.C. 720 et seq.);

(G) provision of information regarding how the local area is performing on the local performance measures and any additional performance information with respect to the one-stop delivery system in the local area;

(H) provision of accurate information relating to the availability of supportive services, including child care and transportation, available in the local area, and referral to such services, as appropriate;

(I) provision of information regarding filing claims for unemployment compensation;

(J) assistance in establishing eligibility for--
(i) welfare-to-work activities authorized under section 403(a)(5) of the Social Security Act (as added by section 5001 of the Balanced Budget Act of 1997) available in the local area; and

(ii) programs of financial aid assistance for training and education programs that are not funded under this Act and are available in the local area; and

(K) follow-up services, including counseling regarding the workplace, for participants in workforce investment activities authorized under this subtitle who are placed in unsubsidized employment, for not less than 12 months after the first day of the employment, as appropriate.

(iii) Information relating to local occupations in demand and the earnings and skill requirements for such occupations;

(6) Provision of program performance information and program cost information on:

(i) Eligible providers of training services described in WIA section 122;

(ii) Eligible providers of youth activities described in WIA section 123;

(iii) Providers of adult education described in title II;

(iv) Providers of postsecondary vocational education activities and vocational education activities available to school dropouts under the Carl D. Perkins Vocational and Applied Technology Education Act (20 U.S.C. 2301 et seq.); and

(v) Providers of vocational rehabilitation program activities described in title I of the Rehabilitation Act of 1973 (29 U.S.C. 720 et seq.);

(7) Provision of information on how the local area is performing on the local performance measures and any additional performance information with respect to the One-Stop delivery system in the local area;

(8) Provision of accurate information relating to the availability of supportive services, including, at a minimum, child care and transportation, available in the local area, and referral to such services, as appropriate;

(9) Provision of information regarding filing claims for unemployment compensation;

(10) Assistance in establishing eligibility for--

(i) Welfare-to-work activities authorized under section 403(a)(5) of the Social Security Act (42 U.S.C. 603(a)(5)) available in the local area; and

(ii) Programs of financial aid assistance for training and education programs that are not funded under this Act and are available in the local area; and

(11) Follow-up services, including counseling regarding the workplace, for participants in workforce investment activities authorized under subtitle (B) of title I of WIA who are placed in unsubsidized employment, for not less than 12 months after the first day of the employment, as appropriate.

SEC. 662.250 WHERE AND TO WHAT EXTENT MUST
REQUIRED ONE-STOP PARTNERS MAKE CORE SERVICES
AVAILABLE?

(a) At a minimum, the core services that are applicable to the program of the partner under Sec. 662.220, and that are in addition to the basic labor exchange services traditionally provided in the local area under the Wagner-Peyser program, must be made available at the comprehensive One-Stop center. These services must be made available to individuals attributable to the partner's program who seek assistance at the center. The adult and dislocated worker program partners are required to make all of the core services listed in Sec. 662.240 available at the center in accordance with 20 CFR 663.100(b)(1).

(b) The applicable core services may be made available by the provision of appropriate technology at the comprehensive One-Stop center, by co-locating personnel at the center, cross-training of staff, or through a cost reimbursement or other agreement between service providers at the comprehensive One-Stop center and the partner, as described in the MOU.

(c) The responsibility of the partner for the provision of core services must be proportionate to the use of the services at the comprehensive One-Stop center by the individuals attributable to the partner's program. The specific method of determining each partner's proportionate responsibility must be described in the MOU.

(d) For purposes of this part, individuals attributable to the partner's program may include individuals who are referred through the comprehensive One-Stop center and enrolled in the partner's program after the receipt of core services, who have been enrolled in the partner's program prior to receipt of the applicable core services at the center, who meet the eligibility criteria for the partner's program and who receive an applicable core service, or who meet an alternative definition described in the MOU.

(e) Under the MOU, the provision of applicable core services at the center by the One-Stop partner may be supplemented by the provision of such services through the networks of affiliated sites and networks of One-Stop partners described in WIA section 134(c)(2).

SEC. 663.150 WHAT CORE SERVICES MUST BE PROVIDED TO
ADULTS AND DISLOCATED WORKERS?

(a) At a minimum, all of the core services described in WIA section 134(d)(2) and 20 CFR 662.240 must be

	<p>provided in each local area through the One-Stop delivery system.</p> <p>(b) Follow-up services must be made available, as appropriate, for a minimum of 12 months following the first day of employment, to registered participants who are placed in unsubsidized employment.</p> <p>SEC. 663.155 HOW ARE CORE SERVICES DELIVERED?</p> <p>Core services must be provided through the One-Stop delivery system. Core services may be provided directly by the One-Stop operator or through contracts with service providers that are approved by the Local Board. The Local Board may only be a provider of core services when approved by the chief elected official and the Governor in accordance with the requirements of WIA section 117(f)(2) and 20 CFR 661.310.</p>
<p>INTENSIVE SERVICES [SECTION 1349(D)(3)]</p> <p>Intensive services to adults and dislocated workers are designed for the unemployed who are unable to obtain employment through core services, and have been determined by the one-stop to be in need of more intensive services in order to obtain employment, or in need of intensive services to obtain and retain employment that allows for self-sufficiency. Intensive services include:</p> <ul style="list-style-type: none"> • Comprehensive and specialized assessments of skill levels; • Individual employment plans; • Individual and group counseling; • Case management; and • Short-term prevocational services <p>The intensive services should be provided through the one-stop delivery system either directly through the one-stop operators, or through contracts with service providers that may include contracts with public, private for-profit, and private non-profit service providers approved by the local Board.</p>	
<p style="text-align: center;">ACT</p> <p>(3) INTENSIVE SERVICES. –</p> <p>(A) IN GENERAL. – Funds allocated to a local area for adults under paragraph (2)(A) or (3), as appropriate, of section 133(b), and funds allocated to the local area for dislocated workers under section 133(b)(2)(B), shall be used to provide intensive services to adults and dislocated workers respectively –</p> <p>(i)(I) who are unemployed and are unable to obtain employment through core services provided under paragraph (2); and</p> <p>(II) who have been determined by a one-stop operator to be in need of more intensive services in order to obtain employment; or</p> <p>(ii) who are employed, but who are determined by a one-stop operator to be in need of such intensive services in order to obtain or retain employment that allows for self-sufficiency.</p> <p>(B) DELIVERY OF SERVICES. – Such intensive services shall be provided through the one-stop delivery system--</p>	<p style="text-align: center;">REGS</p> <p>SEC. 663.200 WHAT ARE INTENSIVE SERVICES FOR ADULTS AND DISLOCATED WORKERS?</p> <p>(a) Intensive services are listed in WIA section 134(d)(3)(C). The list in the Act is not all-inclusive and other intensive services, such as out-of-area job search assistance, literacy activities related to basic workforce readiness, relocation assistance, internships, and work experience may be provided, based on an assessment or individual employment plan.</p> <p>(b) For the purposes of paragraph (a) of this section, work experience is a planned, structured learning experience that takes place in a workplace for a limited period of time. Work experience may be paid or unpaid, as appropriate. A work experience workplace may be in the private for profit sector, the non-profit sector, or the public sector. Labor standards apply in any work experience where an employee/ employer relationship, as defined by the Fair Labor Standards Act, exists.</p>

<p>(i) directly through one-stop operators identified pursuant to section 121(d); or</p> <p>(ii) through contracts with service providers, which may include contracts with public, private for-profit, and private nonprofit service providers, approved by the local board.</p> <p>(C) TYPES OF SERVICES. – Such intensive services may include the following:</p> <p>(i) Comprehensive and specialized assessments of the skill levels and service needs of adults and dislocated workers, which may include –</p> <p>(I) diagnostic testing and use of other assessment tools; and</p> <p>(II) in-depth interviewing and evaluation to identify employment barriers and appropriate employment goals.</p> <p>(ii) Development of an individual employment plan, to identify the employment goals, appropriate achievement objectives, and appropriate combination of services for the participant to achieve the employment goals.</p> <p>(iii) Group counseling.</p> <p>(iv) Individual counseling and career planning.</p> <p>(v) Case management for participants seeking training services under paragraph (4).</p> <p>(vi) Short-term prevocational services, including development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct, to prepare individuals for unsubsidized employment or training.</p>	<p>SEC. 663.210 HOW ARE INTENSIVE SERVICES DELIVERED?</p> <p>(a) Intensive services must be provided through the One-Stop delivery system, including specialized One-Stop centers. Intensive services may be provided directly by the One-Stop operator or through contracts with service providers, which may include contracts with public, private for-profit, and private non-profit service providers (including specialized service providers), that are approved by the Local Board. (WIA secs. 117(d)(2)(D) and 134(d)(3)(B).)</p> <p>(b) The Local Board may only be a provider of intensive services when approved by the chief elected official and the Governor in accordance with WIA section 117(f)(2) and 20 CFR 661.310.</p> <p>SEC. 663.220 WHO MAY RECEIVE INTENSIVE SERVICES?</p> <p>There are two categories of adults and dislocated workers who may receive intensive services:</p> <p>(a) Adults and dislocated workers who are unemployed, have received at least one core service and are unable to obtain employment through core services, and are determined by a One-Stop operator to be in need of more intensive services to obtain employment; and</p> <p>(b) Adults and dislocated workers who are employed, have received at least one core service, and are determined by a One-Stop operator to be in need of intensive services to obtain or retain employment that leads to self-sufficiency, as described in Sec. 663.230.</p>
<p>TRAINING SERVICES [Section 134(d)(4)]</p> <p>In general, funds awarded to a local area for adult and dislocated workers must be used to provide training services to adults and dislocated workers who:</p> <ul style="list-style-type: none"> • Have met the eligibility requirements for intensive services and are unable to obtain or retain employment; • After an interview, evaluation, assessment and case management, have been determined by the one-stop operator or one-stop partner to be in need of training services and are determined to have the skills and qualifications to successfully participate; • Select programs that are directly linked to employment opportunities; • Meet the financial need requirements described below; and • Satisfy any priority system adopted by the local Board. <p>Training services include:</p> <ul style="list-style-type: none"> • Individual Training Accounts; • Customized training; • On-the-job training; and • Training for special populations 	
<p style="text-align: center;">ACT</p> <p>(4) TRAINING SERVICES. –</p> <p>(A) IN GENERAL. – Funds allocated to a local</p>	<p style="text-align: center;">REGS</p> <p>SEC. 663.310 WHO MAY RECEIVE TRAINING SERVICES?</p>

<p>area for adults under paragraph (2)(A) or (3), as appropriate, of section 133(b), and funds allocated to a local area for dislocated workers under section 133(b)(2)(B) shall be used to provide training services to adults and dislocated workers, respectively –</p> <p>(i) who have met the eligibility requirements for intensive services under paragraph (3)(A) and who are unable to obtain or retain employment through such services;</p> <p>(ii) who after an interview, evaluation, or assessment, and case management, have been determined by a one-stop operator or one-stop partner, as appropriate, to be in need of training services and to have the skills and qualifications to successfully participate in the selected program of training services;</p> <p>(iii) who select programs of training services that are directly linked to the employment opportunities in the local area involved or in another area in which the adults or dislocated workers receiving such services are willing to relocate;</p> <p>(iv) who meet the requirements of subparagraph (B); and</p> <p>(v) who are determined to be eligible in accordance with the priority system, if any, in effect under subparagraph (E).</p>	<p>Training services may be made available to employed and unemployed adults and dislocated workers who:</p> <p>(a) Have met the eligibility requirements for intensive services, have received at least one intensive service under Sec. 663.240, and have been determined to be unable to obtain or retain employment through such services;</p> <p>(b) After an interview, evaluation, or assessment, and case management, have been determined by a One-Stop operator or One-Stop partner, to be in need of training services and to have the skills and qualifications to successfully complete the selected training program;</p> <p>(c) Select a program of training services that is directly linked to the employment opportunities either in the local area or in another area to which the individual is willing to relocate;</p> <p>(d) Are unable to obtain grant assistance from other sources to pay the costs of such training, including such sources as Welfare-to-Work, State-funded training funds, Trade Adjustment Assistance and Federal Pell Grants established under title IV of the Higher Education Act of 1965, or require WIA assistance in addition to other sources of grant assistance, including Federal Pell Grants (provisions relating to fund coordination are found at Sec. 663.320 and WIA section 134(d)(4)(B)); and</p> <p>(e) For individuals whose services are provided through the adult funding stream, are determined eligible in accordance with the State and local priority system, if any, in effect for adults under WIA section 134(d)(4)(E) and Sec. 663.600. (WIA sec. 134(d)(4)(A).)</p>
<p>FINANCIAL QUALIFICATIONS [Section 134(d)(4)(B)]</p> <p>Training services must be limited individuals who are unable to obtain other grant assistance for services, including federal Pell grants established under the Higher Education Act, or require assistance beyond the assistance made available under other grant assistance programs, including federal Pell programs. However, training services may be provided to an individual who otherwise meets the requirements described above while an application for a federal Pell grant is pending. If the individual is subsequently granted a Pell award, reimbursement may be made to the local area.</p> <p>The regulations pay particular attention to the requirement that individuals eligible for training first exhaust other grant resources before obtaining assistance under Title I of the WIA. This area of the regulations was expanded to clarify issues regarding Pell Grant reimbursement, particularly the fact that the portion of a Pell Grant paid to WIA participants for education-related expenses (as opposed to tuition) need not be reimbursed. The preamble emphasizes that program operators and training providers should consider all available sources of funds, excluding loans, in determining the total funds available to a particular participant. Making this determination will require considerable coordination between program operators, WIA counselors, and individuals experienced in the Federal application requirements for Pell Grants.</p>	
<p style="text-align: center;">ACT</p> <p>(B) QUALIFICATION. –</p> <p>(i) REQUIREMENT. – Except as provided in clause (ii), provision of such training services shall be limited to individuals who</p>	<p style="text-align: center;">REGS</p> <p>SEC. 663.320 WHAT ARE THE REQUIREMENTS FOR COORDINATION OF WIA TRAINING FUNDS AND OTHER GRANT ASSISTANCE?</p>

<p>limited to individuals who--</p> <p>(I) are unable to obtain other grant assistance for such services, including Federal Pell Grants established under title IV of the Higher Education Act of 1965 (20 U.S.C. 1070 et seq.); or</p> <p>(II) require assistance beyond the assistance made available under other grant assistance programs, including Federal Pell Grants.</p> <p>(ii) REIMBURSEMENTS. – Training services may be provided under this paragraph to an individual who otherwise meets the requirements of this paragraph while an application for a Federal Pell Grant is pending, except that if such individual is subsequently awarded a Federal Pell Grant, appropriate reimbursement shall be made to the local area from such Federal Pell Grant.</p> <p>(C) PROVIDER QUALIFICATION. – Training services shall be provided through providers identified in accordance with section 122.</p>	<p>(a) WIA funding for training is limited to participants who:</p> <p>(1) Are unable to obtain grant assistance from other sources to pay the costs of their training; or</p> <p>(2) Require assistance beyond that available under grant assistance from other sources to pay the costs of such training. Program operators and training providers must coordinate funds available to pay for training as described in paragraphs (b) and (c) of this section.</p> <p>(b) Program operators must coordinate training funds available and make funding arrangements with One-Stop partners and other entities to apply the provisions of paragraph (a) of this section. Training providers must consider the availability of other sources of grants to pay for training costs such as Welfare-to-Work, State-funded training funds, and Federal Pell Grants, so that WIA funds supplement other sources of training grants.</p> <p>(c) A WIA participant may enroll in WIA-funded training while his/ her application for a Pell Grant is pending as long as the One-Stop operator has made arrangements with the training provider and the WIA participant regarding allocation of the Pell Grant, if it is subsequently awarded. In that case, the training provider must reimburse the One-Stop operator the WIA funds used to underwrite the training for the amount the Pell Grant covers. Reimbursement is not required from the portion of Pell Grant assistance disbursed to the WIA participant for education-related expenses. (WIA sec. 134(d)(4)(B).)</p>
<p>TYPES OF TRAINING SERVICES [Section 134(d)(4)(B)]</p> <p>The types of training services that may be carried out with funding for adults and dislocated workers include:</p> <ol style="list-style-type: none"> 1. Occupational skills training, including training for nontraditional employment; 2. On-the-job training; 3. Programs that combine workplace training with related instruction, which may include cooperative education programs; 4. Training programs provided by the private sector; 5. Skill upgrading and retraining; 6. Entrepreneurial training; 7. Job readiness training; 8. Adult education and literacy activities provided in combination with other services; and 9. Customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training. 	
<p style="text-align: center;">ACT</p> <p>(D) TRAINING SERVICES. – Training services may include –</p> <p>(i) occupational skills training, including training for nontraditional employment;</p> <p>(ii) on-the-job training;</p> <p>(iii) programs that combine workplace training with related instruction, which may include cooperative education programs;</p>	<p style="text-align: center;">REGS</p>

<p>(iv) training programs operated by the private sector;</p> <p>(v) skill upgrading and retraining;</p> <p>(vi) entrepreneurial training;</p> <p>(vii) job readiness training;</p> <p>(viii) adult education and literacy activities provided in combination with services described in any of clauses (i) through (vii); and</p> <p>(ix) customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training.</p>	
<p>PRIORITY IN USE OF TRAINING FUNDS [Section 134(d)(4)(E)]</p> <p>Since eligibility for adult services is not contingent on income, a local area may find that its allocation for adult employment training and dislocated workers is too limited to meet all of its needs. Thus, they may establish a funding priority. Such priority shall be given to recipients of public assistance and other low-income individuals for intensive services and training services. It is expected that the Governor and the local Board will provide guidance to the one-stop operators in the local area with regard to making such priority determinations.</p>	
<p style="text-align: center;">ACT</p> <p>(E) PRIORITY. – In the event that funds allocated to a local area for adult employment and training activities under paragraph (2)(A) or (3) of section 133(b) are limited, priority shall be given to recipients of public assistance and other low-income individuals for intensive services and training services. The appropriate local board and the Governor shall direct the one-stop operators in the local area with regard to making determinations related to such priority.</p>	<p style="text-align: center;">REGS</p> <p>SEC. 663.600 WHAT PRIORITY MUST BE GIVEN TO LOW-INCOME ADULTS AND PUBLIC ASSISTANCE RECIPIENTS SERVED WITH ADULT FUNDS UNDER TITLE I?</p> <p>(a) WIA states, in section 134(d)(4)(E), that in the event that funds allocated to a local area for adult employment and training activities are limited, priority for intensive and training services funded with title I adult funds must be given to recipients of public assistance and other low-income individuals in the local area.</p> <p>(b) Since funding is generally limited, States and local areas must establish criteria by which local areas can determine the availability of funds and the process by which any priority will be applied under WIA section 134(d)(2)(E). Such criteria may include the availability of other funds for providing employment and training-related services in the local area, the needs of the specific groups within the local area, and other appropriate factors.</p> <p>(c) States and local areas must give priority for adult intensive and training services to recipients of public assistance and other low-income individuals, unless the local area has determined that funds are not limited under the criteria established under paragraph (b) of this section.</p> <p>(d) The process for determining whether to apply the priority established under paragraph (b) of this section does not necessarily mean that only the recipients of public assistance and other low income individuals may receive WIA adult funded intensive and training services when funds are determined to be limited in a local area. The Local Board and the Governor may establish a process that gives priority for services to the recipients of</p>

	public assistance and other low income individuals and that also serves other individuals meeting eligibility requirements.
<p>CONSUMER CHOICE REQUIREMENTS [Section 134(d)(4)(F)]</p> <p>In order to maximize the consumer choice in the selection of an eligible provider of training services, each local Board, through the one-stop center, must make available:</p> <ul style="list-style-type: none"> • The state list of eligible providers of training services with a description of the programs through which the providers may offer the training services and information identifying eligible providers of on-the-job training and customized job training; and • The performance information and performance cost information relating to the eligible providers of training services. <p>The Act creates a market-based system for training services, and will provide a "level-playing field" for a wide array of providers – large and small, public and private. Those who provide training services under the Act will have to meet the test private businesses face every day. They will have to deliver value to their customers, or risk losing them. With individuals making their choices based on past performance, ineffective training providers will not survive.</p> <p>Section 663.440(c) states that once an individual eligible for training has chosen a provider, the one-stop operator must refer that individual to the provider and set up an ITA unless the local area has exhausted funds available for ITAs in a program year. However, if ITA funds are exhausted, partner resources and other funds should be reviewed and participants should still receive assistance in arranging for training.</p>	
<p style="text-align: center;">ACT</p> <p>(F) CONSUMER CHOICE REQUIREMENTS. –</p> <p>(i) IN GENERAL. – Training services provided under this paragraph shall be provided in a manner that maximizes consumer choice in the selection of an eligible provider of such services.</p> <p>(ii) ELIGIBLE PROVIDERS. – Each local board, through one-stop centers referred to in subsection (c), shall make available--</p> <p>(I) the State list of eligible providers of training services required under section 122(e), with a description of the programs through which the providers may offer the training services, and the information identifying eligible providers of on-the-job training and customized training required under section 122(h); and</p> <p>(II) the performance information and performance cost information relating to eligible providers of training services described in subsections (e) and (h) of section 122.</p>	<p style="text-align: center;">REGS</p> <p>SEC. 663.440 WHAT ARE THE REQUIREMENTS FOR CONSUMER CHOICE?</p> <p>(a) Training services, whether under ITA's or under contract, must be provided in a manner that maximizes informed consumer choice in selecting an eligible provider.</p> <p>(b) Each Local Board, through the One-Stop center, must make available to customers the State list of eligible providers required in WIA section 122(e). The list includes a description of the programs through which the providers may offer the training services, the information identifying eligible providers of on-the-job training and customized training required under WIA section 122(h) (where applicable), and the performance and cost information about eligible providers of training services described in WIA sections 122 (e) and (h).</p> <p>(c) An individual who has been determined eligible for training services under Sec. 663.310 may select a provider described in paragraph (b) of this section after consultation with a case manager. Unless the program has exhausted training funds for the program year, the operator must refer the individual to the selected provider, and establish an ITA for the individual to pay for training. For purposes of this paragraph, a referral may be carried out by providing a voucher or certificate to the individual to obtain the training.</p> <p>(d) The cost of referral of an individual with an ITA to a training provider is paid by the applicable adult or</p>

	dislocated worker program under title I of WIA.
<p>USE OF INDIVIDUAL TRAINING ACCOUNTS [Section 134(d)(4)(G)]</p> <p>In general, training services offered through these providers must be offered through the use of individual training accounts or vouchers. These individual training accounts will be provided to eligible individuals through the one-stop delivery system.</p> <p>Section 134 provides certain exceptions to the general use of individual training accounts. Instead of using the individual training accounts, training services may be provided pursuant to a contract for services if any one of the following conditions is met:</p> <ul style="list-style-type: none"> • Such services are on-the-job training provided by an employer or customized training; • The local Board determines that there are an insufficient number of eligible providers of training services in the local area to accomplish the purposes of a system of individual training account; or • The local Board determines that there is a training services program of demonstrated effectiveness offered in the area by a community-based organization or another private organization to serve special participant populations that face multiple barriers to employment. <p>Providing training through Individual Training Accounts (ITAs) is a key component of the WIA system. The shift from a system of contract-based training to a system of consumer choice through ITAs reflects the new market based approach of the Act. State and local boards have considerable flexibility in crafting this new system. The Act and the regulations purposefully do not establish requirements in areas such as ITA amounts, duration, or payment procedures.</p> <p>Some local boards have tried to use the ITA exceptions to severely limit or eliminate the use of ITAs in their areas. The preamble clearly rejects this strategy, stating that the exceptions to ITAs are to be used infrequently. This is consistent with the intent of the WIA legislation, which was to maximize customer choice in the selection of training providers</p>	
<p style="text-align: center;">ACT</p> <p>(G) USE OF INDIVIDUAL TRAINING ACCOUNTS. –</p> <p>(i) IN GENERAL. – Except as provided in clause (ii), training services provided under this paragraph shall be provided through the use of individual training accounts in accordance with this paragraph, and shall be provided to eligible individuals through the one-stop delivery system.</p> <p>(ii) EXCEPTIONS. – Training services authorized under this paragraph may be provided pursuant to a contract for services in lieu of an individual training account if the requirements of subparagraph (F) are met and if –</p> <p>(I) such services are on-the-job training provided by an employer or customized training;</p> <p>(II) the local board determines there are an insufficient number of eligible providers of training services in the local area involved (such as in a rural area) to accomplish the purposes of a system of individual training accounts; or</p> <p>(III) the local board determines that there is a training services program of demonstrated effectiveness offered in the local area by a community-based organization or another private organization to serve special participant populations that face multiple barriers to employment.</p>	<p style="text-align: center;">REGS</p> <p>SEC. 663.400 HOW ARE TRAINING SERVICES PROVIDED?</p> <p>Except under the three conditions described in WIA section 134(d)(4)(G)(ii) and Sec. 663.430(a), the Individual Training Account (ITA) is established for eligible individuals to finance training services. Local Boards may only provide training services under Sec. 663.430 if they receive a waiver from the Governor and meet the requirements of 20 CFR 661.310 and WIA section 117(f)(1). (WIA sec. 134(d)(4)(G).)</p> <p>SEC. 663.410 WHAT IS AN INDIVIDUAL TRAINING ACCOUNT (ITA)?</p> <p>The ITA is established on behalf of a participant. WIA title I adult and dislocated workers purchase training services from eligible providers they select in consultation with the case manager. Payments from ITA's may be made in a variety of ways, including the electronic transfer of funds through financial institutions, vouchers, or other appropriate methods. Payments may also be made incrementally; through payment of a portion of the costs at different points in the training course. (WIA sec. 134(d)(4)(G).)</p>

SEC. 663.420 CAN THE DURATION AND AMOUNT OF ITA'S BE LIMITED?

(a) Yes, the State or Local Board may impose limits on ITA's, such as limitations on the dollar amount and/or duration.

(b) Limits to ITA's may be established in different ways:

(1) There may be a limit for an individual participant that is based on the needs identified in the individual employment plan; or

(2) There may be a policy decision by the State Board or Local Board to establish a range of amounts and/or a maximum amount applicable to all ITA's.

(c) Limitations established by State or Local Board policies must be described in the State or Local Plan, respectively, but should not be implemented in a manner that undermines the Act's requirement that training services are provided in a manner that maximizes customer choice in the selection of an eligible training provider. ITA limitations may provide for exceptions to the limitations in individual cases.

(d) An individual may select training that costs more than the maximum amount available for ITAs under a State or local policy when other sources of funds are available to supplement the ITA. These other sources may include: Pell Grants; scholarships; severance pay; and other sources.

SEC. 663.430 UNDER WHAT CIRCUMSTANCES MAY MECHANISMS OTHER THAN ITA'S BE USED TO PROVIDE TRAINING SERVICES?

(a) Contracts for services may be used instead of ITA's only when one of the following three exceptions applies:

(1) When the services provided are on-the-job training (OJT) or customized training;

(2) When the Local Board determines that there are an insufficient number of eligible providers in the local area to accomplish the purpose of a system of ITA's. The Local Plan must describe the process to be used in selecting the providers under a contract for services. This process must include a public comment period for interested providers of at least 30 days;

(3) When the Local Board determines that there is a training services program of demonstrated effectiveness offered in the area by a community-based organization (CBO) or another private organization to serve special participant populations that face multiple barriers to employment, as described in paragraph (b) in this section. The Local Board must develop criteria to be used in determining demonstrated effectiveness, particularly as it applies

	<p>to the special participant population to be served. The criteria may include:</p> <ul style="list-style-type: none"> (i) Financial stability of the organization; (ii) Demonstrated performance in the delivery of services to hard to serve participant populations through such means as program completion rate; attainment of the skills, certificates or degrees the program is designed to provide; placement after training in unsubsidized employment; and retention in employment; and (iii) How the specific program relates to the workforce investment needs identified in the local plan. <p>(b) Under paragraph (a)(3) of this section, special participant populations that face multiple barriers to employment are populations of low-income individuals that are included in one or more of the following categories:</p> <ul style="list-style-type: none"> (1) Individuals with substantial language or cultural barriers; (2) Offenders; (3) Homeless individuals; and (4) Other hard-to-serve populations as defined by the Governor.
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LINKAGES TO OCCUPATIONS IN DEMAND [Section 134(d)(4)(G)(iii)]

The one-stop system must ensure that the training services provided with funding available for adults and dislocated workers are directly linked to occupations that are in demand in the local area or in another area to which an adult or dislocated worker receiving such services is willing to relocate. A local Board may also approve training services for occupations determined by the local Board to be in sectors of the economy that have a high potential for sustained demand or growth in their local area.

ACT**(iii) LINKAGE TO OCCUPATIONS IN DEMAND. –**

Training services provided under this paragraph shall be directly linked to occupations that are in demand in the local area, or in another area to which an adult or dislocated worker receiving such services is willing to relocate, except that a local board may approve training services for occupations determined by the local board to be in sectors of the economy that have a high potential for sustained demand or growth in the local area.

(iv) DEFINITION. – In this subparagraph, the term "special participant population that faces multiple barriers to employment" means a population of low-income individuals that is included in one or more of the following categories:

(I) Individuals with substantial language or cultural barriers.

(II) Offenders.

(III) Homeless individuals.

(IV) Other hard-to-serve populations as defined by the Governor involved.

REGS**PERMISSIBLE LOCAL EMPLOYMENT AND TRAINING ACTIVITIES [Section 134(e)]**

In addition to the required activities discussed above, funds allocated to the local area may also be used for:

1. Customized screening and referral of qualified participants in training services;
2. Customized employment-related services to employers on a fee-for-service basis;
3. Supportive services to adults and dislocated workers who are participating in programs and who are unable to obtain supportive services through other programs; and
4. Needs-related payments to adults and dislocated workers who are unemployed and who cease to qualify for unemployment compensation for the purpose of enabling these individuals to participate in training programs.

ACT**(e) PERMISSIBLE LOCAL EMPLOYMENT AND TRAINING ACTIVITIES. –**

(1) DISCRETIONARY ONE-STOP DELIVERY ACTIVITIES. – Funds allocated to a local area for adults under paragraph (2)(A) or (3), as appropriate, of section 133(b), and funds allocated to the local area for dislocated workers under section 133(b)(2)(B), may be used to provide, through one-stop delivery described in subsection (c)(2) –

(A) customized screening and referral of qualified participants in training services described in subsection (d)(4) to employment; and

(B) customized employment-related services to employers on a fee-for-service basis.

REGS**SEC. 663.145 WHAT SERVICES ARE WIA TITLE I ADULT AND DISLOCATED WORKERS FORMULA FUNDS USED TO PROVIDE?**

(a) WIA title I formula funds allocated to local areas for adults and dislocated workers must be used to provide core, intensive and training services through the One-Stop delivery system. Local Boards determine the most appropriate mix of these services, but all three types must be available for both adults and dislocated workers. There are different eligibility criteria for each of these types of services, which are described at Secs. 663.110, 663.115, 663.220 and 663.310.

(b) WIA title I funds may also be used to provide the other services described in WIA section 134(e):

(2) SUPPORTIVE SERVICES. – Funds allocated to a local area for adults under paragraph (2)(A) or (3), as appropriate, of section 133(b), and funds allocated to the local area for dislocated workers under section 133(b)(2)(B), may be used to provide supportive services to adults and dislocated workers, respectively –

(A) who are participating in programs with activities authorized in any of paragraphs (2), (3), or (4) of subsection (d); and

(B) who are unable to obtain such supportive services through other programs providing such services.

(3) NEEDS-RELATED PAYMENTS. –

(A) IN GENERAL. – Funds allocated to a local area for adults under paragraph (2)(A) or (3), as appropriate, of section 133(b), and funds allocated to the local area for dislocated workers under section 133(b)(2)(B), may be used to provide needs-related payments to adults and dislocated workers, respectively, who are unemployed and do not qualify for (or have ceased to qualify for) unemployment compensation for the purpose of enabling such individuals to participate in programs of training services under subsection (d)(4).

(B) ADDITIONAL ELIGIBILITY REQUIREMENTS. – In addition to the requirements contained in subparagraph (A), a dislocated worker who has ceased to qualify for unemployment compensation may be eligible to receive needs-related payments under this paragraph only if such worker was enrolled in the training services--

(i) by the end of the 13th week after the most recent layoff that resulted in a determination of the worker's eligibility for employment and training activities for dislocated workers under this subtitle; or

(ii) if later, by the end of the 8th week after the worker is informed that a short-term layoff will exceed 6 months.

(C) LEVEL OF PAYMENTS. – The level of a needs-related payment made to a dislocated worker under this paragraph shall not exceed the greater of--

(i) the applicable level of unemployment compensation; or

(ii) if such worker did not qualify for unemployment compensation, an amount equal to the poverty line, for an equivalent period, which amount shall be adjusted to reflect changes in total family income.

(1) Discretionary One-Stop delivery activities, including:

(i) Customized screening and referral of qualified participants in training services to employment; and

(ii) Customized employment-related services to employers on a fee-for-service basis that are in addition to labor exchange services available to employers under the Wagner-Peyser Act.

(2) Supportive services, including needs-related payments, as described in subpart H of this part.

AGENDA ITEM 4: REVIEW OF ONE STOP COMMITTEE BYLAWS – SECTION 5.6

BYLAWS of Workforce Investment San Francisco

February 1, 2001
(Amended April 11, 2001)
(Amended November 20, 2002)

5.0 Committees of the Certified Local Workforce Investment Board

5.1 Guiding principles

- a. The Standing Committees shall:
 1. Conduct public hearings and take public testimony when needed to ensure that all viewpoints are considered, and in all cases when required by statute or regulation.
 2. Provide the LWIB with readily available expertise regarding the policies and direction of the LWIB.
 3. Review staff recommendations with appropriate public hearings and advise the LWIB and the Executive Committee regarding action to be taken.
 4. Provide for broad community participation in LWIB activities.
- b. Members of the Committees who are not Members of the LWIB as set forth in section 3.0, above, shall be voting members of the Committee, but shall not be voting members of the LWIB.
- c. It shall be the responsibility of each committee to establish its schedule for meeting and to ensure that all interested parties are provided with adequate notice of such schedules in conformance with public meeting laws. Committee Chairpersons may delegate such responsibilities to Staff.

5.2 Executive Committee

The Executive Committee shall be comprised of not more than eleven (11) Members of LWIB. The total number of Members appointed, if less than eleven (11), shall be either seven (7) or nine (9). This committee shall review the work plans of other committees, ensure coordination of the work of all committees and hear reports on their progress. This committee is authorized to act on behalf of LWIB and all action taken on behalf of LWIB shall be subsequently presented to LWIB for consideration. This committee shall hear, review and refer matters for action from other committees to LWIB as a Consent Calendar item, see Section 7.2. This Committee shall serve as the Board of Directors of the non-profit corporation, Private Industry Council, Inc.

The Executive Committee shall appoint a Finance Subcommittee. A Finance Subcommittee shall be responsible for the review and advice to the Executive Committee and the LWIB including: (1) monitor and review WIB budgets and expenditures; (2) prepare recommendations for WIA and other funding streams within workforce development system; and (3) review audit and other financial reports from PIC, Inc. as agent of WIB/Mayor partnership. The Finance Subcommittee shall be chaired by a member currently serving on the LWIB

Board, shall consist of a majority of Executive Committee members, shall include a One Stop Committee member, and shall not exceed five members.

5.3 Program Resources Committee

This committee shall have a chairperson who is a Member of the LWIB and shall include a Staff person as a *non-voting* member. The number and source of additional members shall be left to the discretion of the LWIB Chairperson and the committee chairperson. The membership of the committee shall be not less than five (5) and not more than seventeen (17)

The Program Resources Committee shall be responsible for the review and advice to the Executive Committee and to the LWIB of funding recommendations for programs and services for adult job seekers. This Committee shall develop, approve and recommend design and solicitation criteria for adult job seekers. This committee shall also prepare recommendations for local criteria for the Eligible Training Provider List (ETPL). Subcommittees of the Program Resources Committee shall be appointed at the discretion of the LWIB Chairperson and this committee Chairperson and may include special populations, e.g. refugees, homeless persons.

The Program Resources Committee shall also be responsible for the research and evaluation tasks of the LWIB. These tasks shall include responsibilities for the review and advice to the Program Resources Committee of the overall quality of programs authorized by the LWIB. These tasks shall also include assistance in developing a robust capacity driven by federal mandates, best practices and employer needs through analysis and assessment of programs for job seekers and employers, capacity of service providers, relative success and significance of interventions to move people in San Francisco to high skill, high wage employment.

5.4 Youth Council

This committee shall have a chairperson who is a Member of the LWIB and shall include a Staff person as a *non-voting* member. The membership of the committee shall be not less than fifteen (15) and not more than twenty-nine (29) . The Youth Council shall be appointed by the LWIB in cooperation with the CLEO, and shall include:

a. Membership

1. members of the LWIB with special interest or expertise in youth policy;
2. representatives of youth service agencies, including juvenile justice and local law enforcement agencies;
3. representatives of local housing authorities;
4. parents of youths seeking assistance from LWIB programs;
5. individuals, including former participants, and representatives of organizations, that have experience relating to youth activities;
6. representatives of the Job Corps, as appropriate.
7. other individuals or representatives of entities as determined appropriate by the LWIB in cooperation with the CLEO.

b. Duties

1. Develop portions of the Local Plan relating to eligible youth;
2. Subject to approval of the LWIB and in conformance with the requirements of the Act:

(a) develop, approve and recommend the design and solicitation criteria for youth services and activities; and
(b) conduct oversight with respect to the eligible providers of youth activities.

3. Coordinate youth activities as authorized in the Act
4. Other duties determined appropriate by the Chairperson of the LWIB.

5.5 Employer Services

This committee shall have a chairperson who is a Member of the LWIB and shall include a Staff person as a *non-voting* member. The number and source of additional members shall be left to the discretion of the LWIB Chairperson and the committee chairperson. The membership of the committee shall be not less than seven (7) and not more than eleven (11).

This committee shall focus on San Francisco's changing industry and occupational structure, identify sectors in the forefront of San Francisco's growth and assess their service and workforce needs. Coordinate and plan delivery of business services including tax credits, First Source Hiring, and labor market information. Design methods and practices to engage employers in the publicly financed workforce delivery system including: customized training, career ladder skills training, and criteria for "work-ready" job seekers. This committee shall also prepare recommendations to LWIB and the Executive Committee concerning marketing and public relations of the workforce development system to employers.

5.6 One-Stop Operations and Services

This committee shall have a chairperson who is a Member of the LWIB and shall include a Staff person as a *non-voting* member. The number and source of additional members shall be left to the discretion of the LWIB Chairperson and the committee chairperson. The membership of the committee shall be not less than eleven (11) and not more than fifteen (15).

This committee shall be the planning committee of One-Stop San Francisco (OSSF), the local One-Stop System. This committee shall monitor operations of OSSF; operation of facilities (centers and satellite locations) and operation of systems (technology, personnel staffing and training). This committee shall be responsible for recommendation of Memoranda of Understanding with One-Stop Partners as required by the Act. This committee shall also prepare recommendations for development of marketing strategies for OSSF.

5.7 Other committees

From time to time, the Executive Committee may establish Ad Hoc Committees or Task Forces to accomplish specific projects. The need for such committees will be determined by the Executive Committee, along with their composition, membership and structure.

5.8 Term of appointment

Unless otherwise specified in the request to serve as a member of any committee, the term of appointment will be one (1) year. Each year, after the election of Officers of the Council, the Chairperson shall review all committee assignments and will issue new letters of appointment

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

4 August 2003

Dear WISF Board and Committee Retreat Participants:

We just wanted to take a moment to thank you – once again – for taking a full day to participate in the WIB Board Retreat last Friday, August 1, 2003. Your dedication to San Francisco's workforce development infrastructure is unparalleled. You will soon be sent a survey on the Retreat. Please take the time to help us with this evaluation.

As you can imagine, planning this Retreat was challenging. While most Board retreats are convened to think about "big picture" items or to develop interpersonal rapport, we used this day differently. We believed that it was critical to come to terms with a set of policy questions and analysis that have been stumping the Board for two years, and whose answers would enable us to move forward, in multiple trajectories. Namely, we hoped to achieve three goals:

1. A common language around the One-Stop System.
2. A shared understanding of our commonalities and differences regarding attributes of and aspirations for the One Stop System, and
3. The development of performance and success measures for non-training elements of the One Stop System, and, if possible, an understanding of their relative prioritization.

While our work is not done, we fundamentally believe that the Board and Committee members who attended the Retreat made significant progress toward achieving all of the goals of the day. Specifically, we accomplished the following:

- Acceptance of basic definitions of key terms describing the One Stop System. While the definitions were "skeletal", we can all speak a common language, laying the foundation for future work on identifying the more complex System attributes – such as customer prioritization, allocation issues, staffing, and marketing.
- Articulation of shared aspirations and attributes of the System. These aspirations can now be used to articulate the mission of the One-Stop System. They also create a framework for addressing the customer prioritization issue, as well as for identifying the roles and responsibilities of various One Stop System players.
- Creation of a detailed set of performance and success measures by which to evaluate the return on investment in various elements of the One-Stop System.
- An understanding of the complexity in prioritizing among One Stop System Elements and an interesting first impression "vote" on System elements.
- A thoughtful collection of words of advice – relating to any of organizational, interpersonal, and policy strategies -- in creating a successful One-Stop System.

We think these are significant accomplishments, and you should be proud of your hard work spent at this unique Retreat.

We also wanted to remind you that those issues that were “off the table” at the Retreat, are now back on the table. We hope that you will participate in the decisions on the following issues at the following times and locations:

Issue	Entity Responsible for Initial Recommendations to Executive Committee
WIA Allocation	Finance Committee
PIC Admin Fee	Finance Committee
Customer Prioritization	Program Resources Committee/Executive Committee
One Stop Center Certification Process	One-Stop Committee

Finally, we are in the process of sorting through the detailed results and responses of the day and look forward to sharing the highlights with you upon completion.

Thank you again. We look forward to your survey responses, and to continuing our great work in San Francisco.

Sincerely,

Lynn Bunim and Pamela Calloway

P.S. Special thanks to those of you who attended the Board Dinner on last Thursday night! We are trying to get a copy of Steve Gunderson’s remarks and will forward them to everyone if we are successful.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING

OF THE

ONE STOP OPERATION AND SERVICES COMMITTEE

AND

EMPLOYER SERVICES COMMITTEE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD

DOCUMENTS DEPT.

SEP - 9 2003

SAN FRANCISCO
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Date: Monday, September 15, 2003

Time: 1:00 p.m. - 3:00 p.m.

Location: Community College District Office
Auditorium
33 Gough Street
San Francisco, CA 94103

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Issued: Monday, September 8, 2003

**PROPOSED AGENDA
MONDAY, SEPTEMBER 15, 2003
ONE STOP OPERATION AND SERVICES COMMITTEE
AND
EMPLOYER SERVICES COMMITTEE**

1. Adoption of the Agenda (*Action Item*)
2. Approval of draft minutes from the August 18, 2003 One Stop Committee meeting (*Action Item*)*
3. Approval of draft minutes from the June 25, 2003 Employer Services Committee meeting (*Action Item*)*
4. Public Testimony on Agenda Items (*Discussion Item*)
5. WIB Retreat Work Product (*Discussion Item*)
6. Discussion of areas of mutual interest (*Discussion and Possible Action Item*)
 - o Development of a One-Stop Business Plan
 - o Employer Services Forum
7. Employer Services (*Discussion and Possible Action Item*)
 - o Customized Training Status Report
 - o Customized Screening Initiative
8. One Stop Committee (*Discussion and Possible Action Item*)
 - o Consortium Directors' Retreat
 - o One-Stop Center Activity Reports
9. Public Testimony on Non-Agenda Items (*Discussion Item*)
10. Future One Stop and Joint Meeting Dates and Agenda Items (*Discussion Item*)
11. Adjournment (*Action Item*)

* Information to be sent.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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**DRAFT MINUTES OF THE
SEPTEMBER 15, 2003 JOINT MEETING OF THE
EMPLOYER SERVICES COMMITTEE AND
ONE STOP COMMITTEE OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD**

JAN - 2 2004

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The meeting was held in the Auditorium of San Francisco Community College District Office located at 33 Gough Street in San Francisco, California 94103.

PRESENT:

William Allen, Steve Arcelona, Rosalie Bulach, Kathye Citron, Theresa Feeley, Nathan Nayman, John Poremba, Victor Revenko, Ave Seltsam and Abby Snay

ABSENT:

Anita Aaron, James Buick, Nicholas de Lorenzo, Corliss Fong, Phyllis McGuire, Craig Newmark, Darlene Rutkowski and Stan Warren

STAFF:

Alice Chiu, Asper Choup, Cathy deCristofaro, Wes Dixon, Lucia Hughes, Emma Perez, and Robert Schwab

PUBLIC:

Larry Braynen, Betty Broussard, Cynthia Buitrago, Louis Dunn, Devra Edelman, Robert Hector, Julie Kim, Patrick Klune, Ted Koch, Cheemeny Lee, Bernard Leung, Mark Mak, Rhody McCoy, Shawishi Monroe, Stephen Poulin, Patricia Peretz, Mario Quevedo, Linda Rosel, Kevin Stange, Diane Wagner, and Les Wong

The meeting was convened at 1:15 P.M. The Employer Services Committee established its quorum at 1:25 P.M. The One Stop Committee established its quorum at 1:58 P.M.

Item 8 – One Stop Committee

Consortium Director's Retreat

Robert Schwab informed the Committee that the One Stop Directors Consortium is planning a retreat on September 26th. The Directors would discuss the WISF retreat result, further develop their goals and objectives, and address the issues of the One Stop System budget and cost allocation process.

Victor Revenko asked if the One Stop Committee have a role in the retreat. Mr. Schwab responded that the retreat is an open meeting and that there will be a full report to the One Stop Committee afterwards.

One Stop Center Activities

Cathy de Cristofaro informed the Committee that the swipe card system is currently collecting informational data.

Chair Bulach expressed interest in seeing what data is available to profile the average One Stop customer.

Devra Edelman requested a report on the use of WIA funds that are set-aside for One Stop. John Poremba clarified that the request is for a financial report of the 13% One Stop set aside. Chair Bulach said that the financial report is on the Finance Subcommittee's future agenda. Ms. de Cristofaro emphasized that the dollars in the One Stop System are not only WIA dollars.

Item 7 – Employer Services Committee

Customized Screening Initiative

Robert Schwab presented a brief overview of the customized screening initiative offered through the customized training program.

Victor Revenko asked which employers are targeted for this program and service. Mr. Schwab replied that needs to be decided by the Employer Services Committee. Nathan Nayman added that Board has worked with the San Francisco Center for Economic Development. The Center has completed an initial analysis of workforce cluster groups. The Employer Services Committee would use that tool to see which clusters of employers or industries would generate jobs in San Francisco.

William Allen was concerned if the One Stop could supply the demand and expressed interest in the average One Stop customer and if those customers meet the employer's demands.

Victor Revenko suggested having an association like Small Business Association underwrite this service to gain credibility and resource. Nathan Nayman added that associations have membership dues for various services – perhaps offer screening as a service.

Customized Training Program Status Report

Robert Schwab gave a brief update of the customized training program.

Item 6 – Discussion in Areas of Mutual Interest

Employer Forum

Lucia Hughes and Sean Hallisey presented a status report on the preparation for the October 24th Employer Forum.

Nathan Nayman suggested giving out coupons or vouchers for the customized screening to attendees.

One Stop Business Plan

Robert Schwab presented an overview of a proposed two-year business plan for the One Stop.

The One Stop Committee will review and approve the plan at their next meeting, October 20, 2003.

Steve Arcelona informed the Committees that the Controller's office is auditing the workforce system in San Francisco. He also suggested using the Best of the Bay award as a marketing tool.

Abby Snay pointed out that the reauthorization of the WIA would change the plan.

Item 5 – WISF Retreat Work Product

Pamela Calloway presented a brief overview of the work product of the WISF retreat.

Motion to adopt agenda was made by Nicholas de Lorenzo and seconded by Kathy Citron.

Ayes: William Allen, Steve Arcelona, Kathy Citron, Theresa Feeley, Nathan Nayman, John Poremba, Victor Revenko, Ave Seltsam and Abby Snay

Nays: None

Abstentions: None

Motion passed.

Motion to adopt the minutes of the August 18, 2003 meeting was made by Victor Revenko and seconded by William Allen.

Ayes: William Allen, Kathy Citron, John Poremba, Victor Revenko, and Abby Snay

Nays: None

Abstentions: None

Motion passed.

Motion to adopt the minutes of the June 25, 2003 was made by Steve Arcelona and seconded by William Allen.

Ayes: William Allen, Steve Arcelona, Kathy Citron, Theresa Feeley, Nathan Nayman, John Poremba, and Ave Seltsam

Nays: None

Abstentions: None

Motion passed.

Public Testimony on Non Agenda Items

Gary Grady of Glide Foundation offered assistance with the Employer Forum.

Cathy deCristofaro announced that the One Stop would hold a booth in the exhibit hall at the Northern California Human Resources Conference.

Motion to adjourn was made by Victor Revenko and seconded by William Allen.

Ayes: William Allen, Steve Arcelona, Kathy Citron, Theresa Feeley, Nathan Nayman, John Poremba, Victor Revenko, Ave Seltsam and Abby Snay

Nays: None

Abstentions: None

Motion passed.

The Committees adjourned at 3:00 P.M.

Notice of Meeting

**Please note that the scheduled
October 20th One Stop
Committee Meeting has been
cancelled.**

**The next One Stop Committee
Meeting is November 17th
from 1 PM to 3 PM at 33
Gough Street Auditorium.**

**Thank you for your
immediate attention to this
matter.**

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING

OF THE

**ONE STOP OPERATION AND SERVICES COMMITTEE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD**

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NOV 14 2003

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Date: Monday, November 17, 2003
Time: 1:00 p.m. – 3:00 p.m.
Location: Community College District Office
Auditorium
33 Gough Street
San Francisco, CA 94103

11-14-03P02:22 PCVD

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Issued: Monday, November 10, 2003

**PROPOSED AGENDA
MONDAY, NOVEMBER 17, 2003
ONE STOP OPERATION AND SERVICES COMMITTEE**

1. Adoption of the Agenda (*Action Item*)
2. Public Testimony on Agenda Items (*Discussion Item*)
3. Draft "One Stop Career Center System Plan" (*Discussion and Possible Action Item*)*
4. Proposed Expenditure Plans for WIA share of One Stop System Budget PY'03-'04 (*Discussion Item*)*
5. Finance Subcommittee Report (*Information Item*)
6. One Stop Consortium Operator Report (*Information Item*)
7. Accessibility Workgroup Report (*Information Item*)
8. One Stop Disability Program Navigator Report (*Information Item*)
9. Employer Services Committee Report (*Information Item*)
10. Public Testimony on Non-Agenda Items (*Discussion Item*)
11. Future One Stop Meeting Dates and Agenda Items (*Discussion Item*)
12. Adjournment (*Action Item*)

* Information to be sent

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

DRAFT MINUTES OF THE

NOVEMBER 17, 2003 MEETING OF THE

ONE STOP COMMITTEE OF THE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD

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The meeting was held in the Auditorium of San Francisco Community College District Office located at 33 Gough Street in San Francisco, California 94103.

PRESENT:

William Allen, James Buick, Rosalie Bulach, Phyllis McGuire, Craig Newmark, Victor Revenko, and Darlene Rutkowski

ABSENT:

Kathy Citron, Nicholas de Lorenzo, Devra Edelman, John Poremba, and Abby Snay

STAFF:

Cathy deCristofaro, Sean Hallisey, Karen Hart, Lucia Hughes, Roy Li, Jeffrey Scarcello, and Robert Schwab

PUBLIC:

Gwen Henry, Greg Johnson, Bernard Leung, Tony Lugo, Cleo Reece, Eileen Tompkins, Doug Yee

The meeting was convened at 1:04 P.M. A quorum was established at 1:09 PM.

Pamela Calloway informed the Committee that the sunshine training must be completed by the end of the year. Staff is in process of making the training available via Internet. If that fails, then Members would be able to borrow the training videotape.

Craig Newmark asked of the status of the technology project. He recalled that there were issues or concerns of security. He offered his assistance if needed. Ms. Calloway replied that staff will address this within the next 15 days.

Chair Bulach expressed her concern of not receiving the business plan in advance. Ms. Calloway responded that the plan is a discussion item and staff will walk through the plan with the Committee.

Motion to adopt the agenda was made by Victor Revenko and seconded by Phyllis McGuire.

Ayes: William Allen, James Buick, Phyllis McGuire, Craig Newmark, Victor Revenko, and Darlene Rutkowski

Nays: None

Abstentions: None

Motion passed.

Chair Bulach asked that public testimony be taken at the time of the agenda item.

One Stop Business Plan

Cathy DeCristofaro presented an overview of the draft business plan.

Victor Revenko observed that the plan is closely aligned with the Committee's year-long discussions. The progress goals create accountability.

Chair Bulach commented that it would be hard to move forward without known costs. She also asked what are the goals of the One Stop and who sets them – WISF Board? One Stop Operator?

Jim Buick replied that the Board sets the goals for One Stop. He asked when is the next Board meeting. (December 9, 2003)

Pamela Calloway reminded the Committee that they are the Board and that staff developed the plan from the Board and Committee's discussion at the retreat.

Chair Bulach commented that the items need to be reviewed and see how it may impact the budget, pointing out that there are missing pieces.

Darlene Rutkowski pointed out that she didn't see concerns of allocating to the contracts or fee-for-service addressed.

Chair Bulach suggested getting an independent Operator.

William Allen asked what impact would the new mayor have on the plan. Pamela Calloway replied that there is a range of possibilities and both of the Mayoral candidates have strong interests in workforce and economic development.

Cathy deCristofaro recapped from the discussion – goals need to be clearer and the time and dollars issues need to be addressed.

Phyllis McGuire asked what is the timeline to approve the plan. (December 15th)

Jim Buick suggested that the next Committee meeting be changed to December 8th (same time) to address this specifically.

Darlene Rutkowski also pointed out that there isn't a technology component. Ms. deCristofaro replied that it is embedded in each goal.

Victor Revenko suggested that the assumptions be listed so that the Committee can better understand the framework. He also suggested that there be an open invitation to the December 8th meeting.

Chair Bulach replied that she would send a letter to Board and other Committees to invite them to the December 8th meeting.

Item 4 – Expenditure Plan

Robert Schwab presented an overview and background of the One Stop budget.

Referring to the last page, Chair Bulach asked if the set aside personnel costs are future position being seek. (Yes) She asked if the \$100,000 set aside has been utilized. Mr. Schwab replied that there are several agreements in place but they have not been executed.

Jim Buick commented that \$995,000 have been set aside and the One Stop Committee should decide how it should be spent. He expressed that he was not comfortable letting the Finance Subcommittee decide.

Item 5 – Cost Allocation Plan

Adrian Trujillo gave a brief update on the One Stop Cost Allocation Plan.

Item 6 – Disability Navigator Position

Joel Streicker presented a brief overview of the job announcement.

Future Meeting Schedules and Other Agenda Items

Chair Bulach asked that the Committee meetings be changed to the first Mondays of every month for next year.

Ms. deCristofaro reminded that the Memoranda of Understanding are due for approval. Chair Bulach instructed staff to submit the MOUs with changes, if any, and give to Partners for comments.

The meeting was adjourned at 3:06 P.M.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING

OF THE

ONE STOP OPERATION AND SERVICES COMMITTEE

WORKFORCE INVESTMENT SAN FRANCISCO BOARD

DOCUMENTS DEPT.

Date: Monday, December 8, 2003

Time: 1:00 p.m. – 3:00 p.m.

Location: Community College District Office
Auditorium
33 Gough Street
San Francisco, CA 94103

DEC - 4 2003

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Issued: Monday, December 1, 2003

PROPOSED AGENDA
MONDAY, DECEMBER 8, 2003
ONE STOP OPERATION AND SERVICES COMMITTEE

1. Adoption of the Agenda (*Action Item*)
2. Public Testimony on Agenda Items (*Discussion Item*)
3. Proposed Action: Approval of One Stop Memoranda of Understanding (*Action Item*)
 - a. Proposed revisions to One Stop Partner MOU for Dept of Rehabilitation
 - b. Proposed renewal of One Stop Partner MOU for all mandatory One Stop partners
4. Proposed Action: Approval of Draft "One Stop Career Center System Business Plan" (*Action Item*)
5. Staff Presentation (*Information Item*)
One Stop Best Practices: San Diego Workforce Partnership
6. Public Testimony on Non-Agenda Items (*Discussion Item*)
7. Future One Stop Meeting Dates and Agenda Items (*Discussion Item*)
8. Adjournment (*Action Item*)



Memorandum

To : Pamela S. Calloway, President
Private Industry Council of San Francisco, Inc.

From : Darlene Rutkowski, District Administrator
San Francisco District

Date : November 26, 2003

Subject : Memorandum of Understanding for One Stop San Francisco
Between the Mayor of the City and County of San Francisco, the
Workforce Investment San Francisco Board and the California
Department of Rehabilitation (DOR)

File No. : DA-03-120

Background:

On October 2, 2003, our revised Memorandum of Understanding, was discussed at the Executive Committee. Since that time, there have been some additional minor changes requested by DOR's Legal Section (see copy attached). I have met with Private Industry Council staff to discuss these recommended changes. These changes are needed to reflect more accurately language noted in our governing legislation, Title I of the Rehabilitation Act (e.g., parties, partners, modified, core services, etc.).

Recommendation:

Add this item to the agenda for the next One Stop Committee's meeting for adoption of this Memorandum of Understanding by the One Stop Committee and, subsequently, approval by the Executive Committee and the full Workforce Investment Board.

If you have further questions or need additional information, please contact me at drutkows@dor.ca.gov or (415) 904-7151.

Attachment

Memorandum of Understanding

One-Stop San Francisco

I. References

Workforce Investment Act of 1998 (Act)

- Workforce Investment San Francisco Board [Section 117(a) of the Act]
- One-Stop San Francisco [Section 121 of the Act]
- Full Service One-Stop Center [Section 134(c)(2)(A), Final Rule 662.100, Subsections (c), (d), and (e)]
- Full Service One-Stop Center signatory partners [Section 121(b)(1), Final Rule 662.230-66.260]
- One-Stop Operator Consortium [Designation of the Operator: Section 117 (d)(2)(A); Selection Process: Section 121(d)(2) and (e); Final Rule 662.420]

II. Introduction

This MOU is entered into in the spirit of cooperation and collaboration by the Mayor of the City and County of San Francisco, the Workforce Investment San Francisco Board, hereafter referred to as "WISF Board", the One-Stop Operator Consortium [the Department of Human Services (DHS), Employment Development Department (EDD), National Council on Aging (NCOA), the Private Industry Council, Inc. (PIC), and the City College of San Francisco (CCSF)], and the Full Service One-Stop Center signatory partners, hereafter referred to as "partners", to describe how their various funding streams and resources will be utilized to better serve their mutual customers, both job seekers and employers/businesses, through an integrated system of service delivery operated at one comprehensive site located at 3120 Mission Street, called the Full Service One-Stop Center, hereafter referred to as the "Center", and 40-plus satellite sites. It is understood that the development and implementation of the Full Service One-Stop Center will require mutual trust and teamwork between the partner agencies, all working together to accomplish shared goals, including customer satisfaction.

III. Strategic Vision for One-Stop San Francisco

The vision for One-Stop San Francisco, hereafter referred to as the "System", is to integrate current services in the Center and satellite sites to move toward providing universal access to career and labor market information and to provide other useful consumer information regarding training and education that enables the customers to make better informed choices.

IV. Services to be Provided At or Through the Full Service One-Stop Center

The following are the services that will be delivered consistent with each partner's program requirements at or through the Center. Additional matrices of services to be provided at the satellites are being developed and will be incorporated into this document as an addendum at a later date. The method for service delivery, the agency responsible for delivering those services, and the various funding resources that each will bring to the operation are listed below:

Core Service	Method for Service Delivery?	Service Provider	Funding Source
1. Determination of eligibility to receive assistance under Title I of WIA			
2. Outreach, intake, and orientation			
3. Initial assessment			
4. Job search and placement assistance, career counseling where appropriate			
5. Labor Market Information			
6. Provision of program performance information and program cost information			
7. Information on the performance of the local area and the One-Stop delivery system			
8. Information on the availability of supportive services in the local area and referral to such services as needed			
9. Information on filing and assistance with UI claims			
10. Assistance in establishing eligibility for WtW activities and financial aid assistance for other training and education programs available in the local area			
11. Follow-up services for 12 months for individuals participating in Title I funded activities placed in unsubsidized employment			

Partner Identified Core Services	Method for Service Delivery?	Service Provider	Funding Source
1.			
2.			

Intensive Services May include the following:	Method for Service Delivery?	Service Provider	Funding Source
1. Comprehensive and specialized assessment	<input type="checkbox"/> Assessment for determining priority for services under Order of Selection • Comprehensive and specialized disability related assessments	Dept. of Rehab	
2. Development of an individual employment plan	Development of IPE	Dept. of Rehab	
3. Group counseling	Group Rehab counseling	Dept. of Rehab	
4. Individual counseling and career planning	<input type="checkbox"/> VR counseling, guidance and referral services • Disability related counseling and career planning	Dept. of Rehab	
5. Case management for participants seeking training services	Case management	Dept. of Rehab	
6. Short-term prevocational services, including development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment or training	Short-term prevocational services	Dept. of Rehab	

Partner Identified Intensive Services	Method for Service Delivery?	Service Provider	Funding Source
Assessment to determine priority for services under Order of Selection	Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Comprehensive and specialized disability related assessments	Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Development of Individual Plan for Employment	Consumer/ Rehabilitation Counselor Collaboration	Dept. of Rehab	Rehabilitation Act Title I
Vocational rehabilitation counseling, guidance, case management, referral	Provided by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Disability related counseling/career planning	Provided by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Short term prevocational services	Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Job search & placement assistance	Staff-deliveredInitiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Physical & mental restoration services	Staff-deliveredInitiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Transportation services necessary to participate in intensive services	Staff-deliveredInitiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Services to family members	Staff-deliveredInitiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Supported employment services	Staff-deliveredInitiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Rehab technology, including assistive technology and devices	Staff-deliveredInitiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Job coaching	Staff-deliveredInitiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Maintenance services	Staff-deliveredInitiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Post employment services	Staff-deliveredInitiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Personal assistance services	Staff-deliveredInitiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Homemaker services	Staff-deliveredInitiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Self employment services	Staff-deliveredInitiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Other VR services determined necessary	Staff-deliveredInitiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I

Training Services May include:	Method for Service Delivery?	Service Provider	Funding Source
1. Occupational skills training			
2. On-the-job training			
3. Programs that combine workplace training with related instruction, which may include cooperative education programs			
4. Training programs operated by the private sector			
5. Skill upgrading and retraining			
6. Entrepreneurial training			
7. Job readiness training			
8. Adult education and literacy activities provided in combination with services described in numbers 1-7 above			
9. *Customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training			

- Include competitive grants such as H-1B and W-t-W.

Partner Identified Training Services	Method for Service Delivery?	Service Provider	Funding Source
<u>Assessment for determining training needs</u>	<u>Provided by Rehabilitation Counselor</u>	<u>Dept. of Rehab</u>	<u>Rehabilitation Act Title I</u>
<u>Vocational rehabilitation counseling, guidance and referral services related to training</u>	<u>Provided by Rehabilitation Counselor</u>	<u>Dept. of Rehab</u>	<u>Rehabilitation Act Title I</u>
<u>Vocational and other training services</u>	<u>Initiated by Rehabilitation Counselor</u>	<u>Dept. of Rehab</u>	<u>Rehabilitation Act Title I</u>
<u>Physical and mental restoration services necessary to participate in training</u>	<u>Initiated by Rehabilitation Counselor</u>	<u>Dept. of Rehab</u>	<u>Rehabilitation Act Title I</u>
<u>Transportation services necessary to participate in training</u>	<u>Initiated by Rehabilitation Counselor</u>	<u>Dept. of Rehab</u>	<u>Rehabilitation Act Title I</u>
<u>Rehab technology needed to complete training</u>	<u>Initiated by Rehabilitation Counselor</u>	<u>Dept. of Rehab</u>	<u>Rehabilitation Act Title I</u>
<u>Maintenance services related to training</u>	<u>Initiated by Rehabilitation Counselor</u>	<u>Dept. of Rehab</u>	<u>Rehabilitation Act Title I</u>
<u>Personal assistance services related to training</u>	<u>Initiated by Rehabilitation Counselor</u>	<u>Dept. of Rehab</u>	<u>Rehabilitation Act Title I</u>
<u>Other VR services related to training and determined necessary to achieve an employment outcome</u>	<u>Initiated by Rehabilitation Counselor</u>	<u>Dept. of Rehab</u>	<u>Rehabilitation Act Title I</u>

V. Referral Process

The methods of referral are not yet in place, however, the Partners acknowledge responsibility and commit to address this issue in the following manner:

It is agreed that the partners of this signed MOU will conduct referral for services in the following manner.

A. All customers referred for services will:

1. Receive a written referral form with the date, time, reason for, and place of the appointment.
 2. Receive scheduling for an appointment within three working days from the date of the referral.
- B. The process for implementation is a work in progress and will be determined, reviewed and evaluated for continuous improvement.

VI. Cost Allocation and Shared Costs

1. A cost allocation plan for the Full Service One Stop Center will be negotiated and developed in accordance with the Act as well as with OMB circulars A-21, A-87, A-110, ASMB C-10, and other Federal and State law and guidance as appropriate.
2. Plan(s) for cost allocation will be reviewed periodically and discussed between all parties. Modifications to the plan must be mutually agreed to in writing by all parties to the MOU.
3. The parties agree that joint application on behalf of the Center which result in an award, will benefit the Center overall and not the respective entity or entities applying for funds.

VII. Full Service One-Stop Center Performance Criteria

This MOU is an opportunity to provide guidance and direction to the partners. By including minimum levels of performance, the MOU becomes the vehicle through which the partners will be able to jointly monitor services against stated goals and performance measures to promote continuous improvement. One of the goals of the Act is to achieve mutually shared outcomes of those participants who receive services by multiple partners.

Therefore, it is agreed that the Center partners will strive to achieve the following standard of quality service for its customers, employees, and partners.

All customers will receive:

- ☐ Prompt and courteous service from the staff.
- ☐ Services designed to assist customers (both jobseekers and employers) in achieving their educational and/or employment goals.

All employees can expect to:

- ☐ Work in a safe and professional environment.
- ☐ Receive the tools necessary to achieve the desired outcome for their customers.

VIII. Governance of the One-Stop San Francisco

The accountability and responsibility for One-Stop San Francisco rests with the WISF Board. Accountability and responsibility for the organizational processes, services, and

accomplishments for the Center will rest with the WISF Board, the One-Stop Operator Consortium, and the partners.

The WISF Board, in partnership with the Mayor of San Francisco, is responsible for setting policy for the portion of the statewide workforce investment system within One Stop San Francisco. This System includes the Full Service One-Stop Center, satellites, and any electronic or physical sites that provide information for services for access to workforce development activities within the San Francisco Workforce Investment Area. In addition, the WISF Board's responsibilities are to:

1. Develop and submit a local plan.
2. Select the One-Stop Operator Consortium as prescribed in the Workforce Investment Act of 1998, Section 117 (d)(2)(A); Final Rule Section 662.410.
3. Develop a budget for the purpose of carrying out the duties of the WISF Board.
4. Conduct oversight with respect to local programs of youth activities authorized under section 129, local employment and training activities authorized under section 134, and the local Workforce Investment System.
5. Negotiate local performance measures.
6. Assist the Governor in developing the statewide employment statistics system.
7. Coordinate the workforce investment activities with economic development strategies and develop other employer linkages with such activities.
8. Promote the participation of private sector employers in the statewide workforce investment system and ensure the effective provision, of connecting, brokering, and coaching activities, through intermediaries such as the One-Stop Operator Consortium or through other organizations, to assist such employers in meeting hiring needs.
9. Adopt a Business Services Vision and strategic plan.
10. Develop a marketing strategy to promote the One-Stop San Francisco.
11. Collaborate with the One-Stop Operator Consortium in developing and maintaining the One-Stop San Francisco technology links.

The One-Stop Committee, as a standing committee of the WISF Board, will recommend policy to the WISF Board regarding operations and delivery of services through the Center.

The One-Stop Operator Consortiums' responsibilities are limited to the Center and include:

1. Ensuring, at a minimum, provision of core/universal services, availability of intensive services, and access to training services;
2. Assuring the integrated participation of the partner agencies;
3. Establishing common systems and procedures at the Center;
4. Assuring cross-training and capacity building for all partners;
5. Assisting with the development of established performance outcomes; including customer satisfaction outcomes for both employers and job-seekers;
6. Recommending policy changes to the WISF Board;
7. Assuring accountability to the WISF Board for terms of the One Stop Operator Consortium/WISF Board agreement;
8. Oversight of the MOUs on behalf of the WISF Board,
9. Providing recommendations for Center funding to the WISF Board;
10. Managing the Center budget;
11. Convening the partners to implement a continuous improvement process for service delivery in the Center;
12. Coordinating seamless service delivery;
13. Implementing a coordinated employer outreach and marketing effort as provided by available funds;
14. Recommending a design/delivery system for employer/business services, including gathering input from the business community and clarification about how such services will be accessed; and
15. With the WISF Board, developing and maintaining the system's technology links.
16. Determining how all the entities who participate in the Full Service One Stop Center can be involved in discussion and decision making for the operation and delivery of services at 3120 Mission Street.
17. Striving to inform and solicit input from all participating Center partners.

The Partner responsibilities will be to:

- Provide services as outlined in this MOU and to coordinate and cooperate with the One-Stop Operator Consortium in the day-to-day delivery of services at the Center and with PIC, Inc. for the required administrative activities within the One Stop San Francisco to extent not inconsistent with the laws and policies governing the partners program or services.

IX. Agreements

It is mutually agreed and understood by and between the parties that:

1. This MOU is neither a fiscal nor a fund obligation document. Specific studies, activities, programs or projects that involve the transfer or expenditure by any party of any money, services, or property will require execution of separate agreements or contracts. Each subsequent agreement or arrangement involving the transfer of money, services or property between the parties to this MOU must comply with all applicable statutes and regulations.

2. This MOU shall be governed by and construed in accordance with the laws of the federal government and the State of California and, as appropriate, shall also be governed by the laws of the City and County of San Francisco and the policies of the WISF Board.
3. During the performance of the MOU, the parties shall not discriminate against any person because of age, race, color, religious or political affiliation, sex, national origin, ancestry, physical or mental disability, medical condition, marital status, veteran, or sexual orientation.
4. The partners agree that policies and procedures established under this MOU and programs and services provided at the Center will comply with the Americans with Disability Act.
5. This MOU in no way restricts any of the parties from participating in similar activities or arrangements with other public or private agencies, organizations or individuals.
6. Parties may place WISF Board approved signage on the Center exterior to identify partner presence. The parties agree to utilize the One Stop San Francisco logo on the building identified for Center usage, letterhead, envelopes, business cards, and any written correspondence and fax transmittals as appropriate. A list of all participating partners will be posted prominently at each site respectively.
7. Parties agree to utilize, to the maximum extent possible, CalJOBS, the State Labor Exchange, as an electronic job matching system within the One Stop San Francisco.

X. Independent Agency Status

It is expressly understood and agreed that this MOU is not intended and shall not be construed to create the relationship of agent, servant, employee, partnership, joint venture or association between parties. Each party will be responsible for providing its own salaries, payroll taxes, withholding, insurance, workers' compensation coverage and other benefits of any kind, as required by law, for its own employees. Individual contracts and agreements between partners are not affected by and do not affect this MOU.

XI. Method for Dispute Resolution

The parties agree to try to resolve policy or practice disputes at the lowest level starting with the staff supervisor. If issues cannot be resolved at this level, they shall be referred to the Center Manager and respective staff employer for discussion and resolution. If issues cannot be resolved at this level, they shall be referred to the One-Stop Operator Consortium for discussion and resolution. If issues cannot be resolved at this level, a third party dispute resolution specialist may be called in to help mediate any disputes. Informal mediation services, however, shall be explored prior to any other formal or legal process. Prior to any matter being pursued through legal process, the dispute will be presented to the WISF Board for review and assistance in resolving.

The parties agree to recognize and comply with applicable labor agreements affecting represented employees located in the Center and satellite sites. This shall include the

right of access by labor organization representatives pursuant to the Ralph C. Dills Act (Chapter 10.39 [commencing with section 3512] of Division 4 of Title I of the Government Code).

The One Stop Operator Consortium and the partners shall cooperate as appropriate and according to partner procedures in the investigation of the following matters: discrimination under the California Fair Employment and Housing Act (Part 2.8 [commencing with Section 12900] of Division 3 of Title 2 of the Government Code), threats and/or violence concerning partner employees and partner employee misconduct.

If the methods described above fail to result in a resolution, the parties involved in the dispute shall first seek third-party mediation. .

XII. Confidentiality

It is the intention of the partners to develop systems to share information throughout One Stop San Francisco. In the initial stages, client information will be shared solely for the purpose of enrollment, referral or provision of services. In carrying out their respective responsibilities, each party shall respect and abide by the confidentiality policies of applicable state and federal laws and regulations.

XIII. Termination

The parties understand that implementation of the MOU is dependent on everyone's good faith effort to work together to improve services to the community. The parties also agree that this is a project where different ways of working together and providing services are being tried. In the event that it becomes necessary for one or more parties to cease being a party to this MOU, that said party(ies) shall notify all other parties, in writing, ninety (90) days in advance of that intention. The other parties shall then determine how to replace or offset the loss of participation and resources to the Center. Termination by one or more of the parties to this MOU does not alter the terms or obligations of the other parties to this MOU.

XIV. Insurance

Each party hereto acknowledges and understands that the State of California has elected to be insured for its general liability through a self-insurance program. Departments of the State of California are covered by a self-insurance plan for general liability administered by the California Department of General Services, Office of Risk and Insurance Management. All other parties agree to maintain in full force and effect during the term of the MOU and any extension thereof, commercial general liability insurance, or self-insurance, with limits of not less than \$1,000,000 single limit coverage per occurrence for bodily injury, personal injury and property damage. Upon request from any other party, a party shall provide an appropriate certificate evidencing such insurance, or self-insurance, to the requesting party.

XV. Site Supervision

The Center Manager will be accountable and responsible to the One Stop Operator Consortium for the day-to-day operation and coordination of services and partner staff assigned to the Center.

Partner staff that is located at the Center shall remain under the supervision of their employing department for the purposes of performance evaluation and other matters concerning civil service or other employment rights and responsibilities. Partner staff, including state employees, performing services at the Center and satellites shall retain existing personnel, civil service and collective bargaining protections on matters related to employment, including but not limited to, hiring, promotion, discipline, and grievance procedures.

XVI. Hours of Operation

The minimum hours of operation of the Center will be Monday through Friday, 8:00 a.m. to 5:00 p.m. All staff will comply with the holiday schedule of their primary employer and will provide a copy of their holiday schedule to the Center Manager at the beginning of each calendar year.

XVII. Duration and Modification of the MOU

The ~~partners-parties~~ agree that the terms of the MOU will take effect upon signature of both ~~parties~~ on July 1, 2003 and will continue in effect until June 30, 2003~~2006~~, or such time as any ~~partner-party~~ or ~~partners-parties~~ will modify, extend or terminate this MOU. Termination of the MOU will be effective in either of two situations:

1. All ~~partners-parties~~ agree in writing to its termination; or
2. One of the ~~partners-parties~~ receives written notification of termination from another ~~partner-party~~.

This MOU may be extended by written agreement between the WISF Board and the Department of Rehabilitation (DOR), provided such agreement is signed by both parties prior to the termination date of this agreement, and contains the following:

- A statement of intent to continue all provisions of the MOU,
- Revised effective and termination dates, and
- Dated signature of the District Administrator on behalf of DOR and of a person authorized to sign on behalf of the WISF Board.

This MOU may be ~~reviewed and renewed annually and modified, altered,~~ or revised, as necessary, by mutual consent of all parties, through the issuance of a written amendment, signed and dated by all parties. This MOU constitutes the entire agreement between the parties hereto and no oral understanding not incorporated herein shall be binding on any of the parties hereto.

Memorandum of Understanding
One Stop San Francisco

SIGNATURES

In WITNESS THEREOF, the parties to this MOU execute this agreement.

Dated: _____, 2004~~2003~~

BY: _____
(Signature of Authorized Officer)

Willie L. Brown, Jr.
Mayor

City and County of San Francisco

1 Dr. Carlton B. Goodlett Place, Room 200

San Francisco, CA 94102-4681

(Legal Name of Party)

Dated: _____, 2004~~2003~~

BY: _____
(Signature of Authorized Officer)

Lynn Bunim,
Chairperson, WISF Board

Workforce Investment San Francisco Board

745 Franklin Street, Suite 200

San Francisco, CA 94102

(Legal Name of Party)

Memorandum of Understanding
One Stop San Francisco

Dated: _____, ~~2001~~2003

BY: _____
(Signature of Authorized Officer)

Darlene Rutkowski, District Administrator

Department of Rehabilitation

185 Berry Street, Lobby 7 #180

San Francisco, CA 94107

(Legal Name of Party)



PRIVATE INDUSTRY COUNCIL
of San Francisco, Inc.

*creating
employment
opportunities*

MEMORANDUM

TO: ONE STOP COMMITTEE MEMBERS **DATE:** DECEMBER 1, 2003

FROM: ROBERT SCHWAB, VICE PRESIDENT

SUBJECT: RECOMMENDATION FOR APPROVAL OF ONE STOP PARTNER MOU CONTINUATION

ACTION REQUESTED

The One Stop Committee is asked to review and approve extending the term of the existing One Stop partner Memoranda of Understanding through June 30, 2004 for each of the One Stop locations at 3120 Mission, 1800 Oakdale, and 801 Turk with updated services matrices and cost sharing agreements.

BACKGROUND

Section 121 (c) of the Workforce Investment Act reads: The local board, with the agreement of the chief local elected official, shall develop and enter into a memorandum of understanding (between the local board and the one-stop partners) concerning the operation of the one-stop delivery system in the local area. Each memorandum of understanding shall contain:

(A) provisions describing-

- (i) the services to be provided through the one-stop delivery system;
- (ii) how the costs of such services and the operating costs of the system will be funded;
- (iii) methods for referral of individuals between the one-stop operator and the one stop partners, for the appropriate services and activities;
- (iv) the duration of the memorandum and the procedures for amending the memorandum during the term of the memorandum; and
- (v) such other provisions, consistent with the requirements of WIA Title I, as the parties to the agreement determine to be appropriate.

On December 5, 2001 the One Stop Committee approved and on January 16, 2002 the Workforce Investment San Francisco Board ratified the MOU between the WISFB and the one-stop partners. Under section XVII:

The partners agree that the terms of the MOU will take effect upon signature of the parties and was to continue in effect until June 30, 2003, or such time as any partner or partners will modify, extend, or terminate this MOU. Termination of the MOU will be effective in either of two situations:

1. all partners agree in writing to its termination; or
2. one of the partners receives written notification of termination from another partner.

This MOU may be reviewed and renewed annually and modified, altered, or revised, as necessary, by mutual consent of all parties, through the issuance of a written amendment, signed and dated by all parties.

RECOMMENDATION

The current One Stop Partner MOUs be extended through June 30, 2004 with the following changes:

1. The MOUs will apply to the One Stop sites at 3120 Mission, 1800 Oakdale and 801 Turk as appropriate.
2. A new Service Matrix (section IV) for each of the One Stop locations partner services will be completed by each partner and added to their MOU(s) prior to Workforce Investment San Francisco Board (WISFB) approval.
3. A cost sharing agreement identifying each partner's share One Stop center and system costs, as appropriate, will be completed by the WISFB Finance Subcommittee with the assistance of each partner and added to their MOU(s).

Attachment

Memorandum of Understanding

One Stop San Francisco

I. References

Workforce Investment Act of 1998 (Act)

- Workforce Investment San Francisco Board [Section 117(a) of the Act]
- One-Stop San Francisco [Section 121 of the Act]
- Full Service One-Stop Center [Section 134(c)(2)(A), Final Rule 662.100, Subsections (c), (d), and (e)]
- Full Service One-Stop Center signatory partners [Section 121(b)(1), Final Rule 662.230-66.260]
- One-Stop Operator Consortium [Designation of the Operator: Section 117 (d)(2)(A); Selection Process: Section 121(d)(2) and (e); Final Rule 662.420]

II. Introduction

This MOU is entered into in the spirit of cooperation and collaboration by the Mayor of the City and County of San Francisco, the Workforce Investment San Francisco Board, hereafter referred to as "WISF Board", and the Full Service One-Stop Center signatory partners, hereafter referred to as "partners", to describe how their various funding streams and resources will be utilized to better serve their mutual customers, both job seekers and employers/businesses, through an integrated system of service delivery operated at one comprehensive site located at 3120 Mission Street, called the Full Service One-Stop Center, hereafter referred to as the "Center", and 40-plus satellite sites. It is understood that the development and implementation of the Full Service One-Stop Center will require mutual trust and teamwork between the partner agencies, all working together to accomplish shared goals, including customer satisfaction.

III. Strategic Vision for One-Stop San Francisco

The vision for One-Stop San Francisco, hereafter referred to as the "System", is to integrate current services in the Center and satellite sites to move toward providing universal access to career and labor market information and to provide other useful consumer information regarding training and education that enables the customers to make better informed choices.

IV. Services to be Provided At or Through the Full Service One-Stop Center

The following are the services that will be delivered at or through the Center. Additional matrices of services to be provided at the satellites are being developed and will be incorporated into this document as an addendum at a later date. The method for service delivery, the agency responsible for delivering those services, and the various funding resources that each will bring to the operation are listed below:

Core Service	Method for Service Delivery?	Service Provider	Funding Source
1. Determination of eligibility to receive assistance under Title I of WIA			
2. Outreach, intake, and orientation			
3. Initial assessment			
4. Job search and placement assistance, career counseling where appropriate			
5. Labor Market Information			
6. Provision of program performance information and program cost information			
7. Information on the performance of the local area and the One-Stop delivery system			
8. Information on the availability of supportive services in the local area and referral to such services as needed			
9. Information on filing UI claims			
10. Assistance in establishing eligibility for WtW activities and financial aid assistance for other training and education programs available in the local area			
11. Follow-up services for 12 months for individuals participating in Title I funded activities placed in unsubsidized employment			

Partner Identified Core Services	Method for Service Delivery?	Service Provider	Funding Source
1.			
2.			
3.			

Intensive Services May include the following:	Method for Service Delivery?	Service Provider	Funding Source
1. Comprehensive and specialized assessment			
2. Development of an individual employment plan			
3. Group counseling			
4. Individual counseling and career planning			
5. Case management for participants seeking training services			
6. Short-term prevocational services, including development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment or training			

Partner Identified Intensive Services	Method for Service Delivery?	Service Provider	Funding Source

Training Services May include:	Method for Service Delivery?	Service Provider	Funding Source
1. Occupational skills training			
2. On-the-job training			
3. Programs that combine workplace training with related instruction, which may include cooperative education programs			
4. Training programs operated by the private sector			
5. Skill upgrading and retraining			
6. Entrepreneurial training			
7. Job readiness training			
8. Adult education and literacy activities provided in combination with services described in numbers 1-7 above			
9. *Customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training			
Partner Identified Training Services	Method for Service Delivery?	Service Provider	Funding Source

* Include competitive grants such as H-1B and W-t-W.

V. Referral Process

The methods of referral are not yet in place, however, the Partners acknowledge responsibility and commit to address this issue in the following manner:

It is agreed that the partners of this signed MOU will conduct referral for services in the following manner.

A. All customers referred for services will:

1. Receive a written referral form with the date, time, reason for, and place of the appointment.
2. Receive scheduling for an appointment within three working days from the date of the referral.

B. The process for implementation is a work in progress and will be determined, reviewed and evaluated for continuous improvement.

VI. Cost Allocation and Shared Costs

1. A cost allocation plan for the Full Service One Stop Center will be negotiated and developed in accordance with the Act as well as with OMB circulars A-21, A-87, A-110, ASMB C-10, and other Federal and State guidance as appropriate.
2. Plan(s) for cost allocation will be reviewed periodically and discussed between all parties. Modifications to the plan must be mutually agreed to in writing.
3. The parties agree that joint application on behalf of the Center which result in an award, will benefit the Center overall and not the respective entity or entities applying for funds.

VII. Full Service One-Stop Center Performance Criteria

This MOU is an opportunity to provide guidance and direction to the partners. By including minimum levels of performance, the MOU becomes the vehicle through which the partners will be able to jointly monitor services against stated goals and performance measures to promote continuous improvement. One of the goals of the Act is to achieve mutually shared outcomes of those participants who receive services by multiple partners.

Therefore, it is agreed that the Center partners will strive to achieve the following standard of quality service for its customers, employees, and partners.

All customers will receive:

- Prompt and courteous service from the staff.
- Services designed to assist customers (both jobseekers and employers) in achieving their educational and/or employment goals.

All employees can expect to:

- Work in a safe and professional environment.
- Receive the tools necessary to achieve the desired outcome for their customers.

VIII. Governance of the One-Stop San Francisco

The accountability and responsibility for One-Stop San Francisco rests with the WISF Board. Accountability and responsibility for the organizational processes, services, and accomplishments for the Center will rest with the WISF Board, the One-Stop Operator Consortium, and the partners.

The WISF Board, in partnership with the Mayor of San Francisco, is responsible for setting policy for the portion of the statewide workforce investment system within One Stop San Francisco. This System includes the Full Service One-Stop Center, satellites, and any electronic or physical sites that provide information for services for access to workforce development activities within the San Francisco Workforce Investment Area. In addition, the WISF Board's responsibilities are to:

1. Develop and submit a local plan.
2. Select the One-Stop Operator Consortium as prescribed in the Workforce Investment Act of 1998, Section 117 (d)(2)(A); Final Rule Section 662.410.
3. Develop a budget for the purpose of carrying out the duties of the WISF Board.
4. Conduct oversight with respect to local programs of youth activities authorized under section 129, local employment and training activities authorized under section 134, and the local Workforce Investment System.
5. Negotiate local performance measures.
6. Assist the Governor in developing the statewide employment statistics system.
7. Coordinate the workforce investment activities with economic development strategies and develop other employer linkages with such activities.
8. Promote the participation of private sector employers in the statewide workforce investment system and ensure the effective provision, of connecting, brokering, and coaching activities, through intermediaries such as the One-Stop Operator Consortium or through other organizations, to assist such employers in meeting hiring needs.
9. Adopt a Business Services Vision and strategic plan.
10. Develop a marketing strategy to promote the One-Stop San Francisco.
11. Collaborate with the One-Stop Operator Consortium in developing and maintaining the One-Stop San Francisco technology links.

The One-Stop Committee, as a standing committee of the WISF Board, will recommend policy to the WISF Board regarding operations and delivery of services through the Center.

The One-Stop Operator Consortiums' responsibilities are limited to the Center and include:

1. Ensuring, at a minimum, provision of core/universal services, availability of intensive services, and access to training services;
2. Assuring the integrated participation of the partner agencies;
3. Establishing common systems and procedures at the Center;
4. Assuring cross-training and capacity building for all partners;
5. Assisting with the development of established performance outcomes; including customer satisfaction outcomes for both employers and job-seekers;
6. Recommending policy changes to the WISF Board;
7. Assuring accountability to the WISF Board for terms of the One Stop Operator Consortium/WISF Board agreement;
8. Oversight of the MOUs on behalf of the WISF Board;
9. Providing recommendations for Center funding to the WISF Board;
10. Managing the Center budget;
11. Convening the partners to implement a continuous improvement process for service delivery in the Center;
12. Coordinating seamless service delivery;
13. Implementing a coordinated employer outreach and marketing effort as provided by available funds;
14. Recommending a design/delivery system for employer/business services, including gathering input from the business community and clarification about how such services will be accessed; and
15. With the WISF Board, developing and maintaining the system's technology links.
16. Determining how all the entities who participate in the Full Service One Stop Center can be involved in discussion and decision making for the operation and delivery of services at 3120 Mission Street.
17. Striving to inform and solicit input from all participating Center partners.
18. Ensuring that reasonable efforts will be made to insure the safety and security of all customers and staff.

The Partner responsibilities will be to:

- Provide services as outlined in this MOU and to coordinate and cooperate with the One-Stop Operator Consortium in the day-to-day delivery of services at the Center and with PIC, Inc. for the required administrative activities within the One Stop San Francisco.

IX. Agreements

It is mutually agreed and understood by and between the parties that:

1. This MOU is neither a fiscal nor a fund obligation document. Specific studies, activities, programs or projects that involve the transfer or expenditure by any party of any money, services, or property will require execution of separate agreements or contracts. Each subsequent agreement or arrangement involving

the transfer of money, services or property between the parties to this MOU must comply with all applicable statutes and regulations.

2. This MOU shall be governed by and construed in accordance with the laws of the federal government and the State of California and shall also be governed by the laws of the City and County of San Francisco and the policies of the WISF Board.
3. During the performance of the MOU, the parties shall not discriminate against any person because of age, race, color, religious or political affiliation, sex, national origin, ancestry, physical or mental disability, medical condition, marital status, veteran, or sexual orientation. The parties also agree to abide by the provision of Executive Order 11246 on nondiscrimination and, accordingly, will take affirmative action to ensure that applicants are employed without regard to their age, race, ancestry, creed, color, religious or political affiliation, sex, physical or mental disability, medical condition, national origin, sexual orientation or marital status.
4. The partners agree that policies and procedures established under this MOU and programs and services provided at the Center will comply with the Americans with Disability Act.
5. This MOU in no way restricts any of the parties from participating in similar activities or arrangements with other public or private agencies, organizations or individuals.
6. Parties may place WISF Board approved signage on the Center exterior to identify partner presence. The parties agree to utilize the One Stop San Francisco logo on the building identified for Center usage, letterhead, envelopes, business cards, and any written correspondence and fax transmittals as appropriate. A list of all participating partners will be posted prominently at each site respectively.
7. Parties agree to utilize, to the maximum extent possible, CalJOBS, the State Labor Exchange, as an electronic job matching system within the One Stop San Francisco.

X. Independent Agency Status

It is expressly understood and agreed that this MOU is not intended and shall not be construed to create the relationship of agent, servant, employee, partnership, joint venture or association between parties. Each party will be responsible for providing its own salaries, payroll taxes, withholding, insurance, workers' compensation coverage and other benefits of any kind, as required by law, for its own employees. Individual contracts and agreements between partners are not affected by and do not affect this MOU.

XI. Method for Dispute Resolution

The parties agree to try to resolve policy or practice disputes at the lowest level starting with the staff supervisor. If issues cannot be resolved at this level, they shall be referred to the Center Manager and respective staff employer for discussion and resolution. If issues cannot be resolved at this level, they shall be referred to the One-Stop Operator Consortium for discussion and resolution. If issues cannot be resolved at this level, a third party dispute resolution specialist may be called in to help mediate any disputes.

Informal mediation services, however, shall be explored prior to any other formal or legal process. Prior to any matter being pursued through legal process, the dispute will be presented to the WISF Board for review and assistance in resolving.

The parties agree to recognize and comply with applicable labor agreements affecting represented employees located in the Center and satellite sites. This shall include the right of access by labor organization representatives pursuant to the Ralph C. Dills Act (Chapter 10.39 [commencing with section 3512] of Division 4 of Title I of the Government Code).

The One Stop Operator Consortium and the partners shall cooperate as appropriate and according to partner procedures in the investigation of the following matters: discrimination under the California Fair Employment and Housing Act (Part 2.8 [commencing with Section 12900] of Division 3 of Title 2 of the Government Code), threats and/or violence concerning partner employees and partner employee misconduct.

If the methods described above fail to result in a resolution, the parties involved in the dispute shall first seek mediation, and as a final method, seek arbitration services at the expense of the respective parties.

XII. Confidentiality

It is the intention of the partners to develop systems to share information throughout One Stop San Francisco. In the initial stages, client information will be shared solely for the purpose of enrollment, referral or provision of services. In carrying out their respective responsibilities, each party shall respect and abide by the confidentiality policies of applicable state and federal laws and regulations.

XIII. Termination

The parties understand that implementation of the MOU is dependent on everyone's good faith effort to work together to improve services to the community. The parties also agree that this is a project where different ways of working together and providing services are being tried. In the event that it becomes necessary for one or more parties to cease being a party to this MOU, that said party(ies) shall notify all other parties, in writing, ninety (90) days in advance of that intention. The other parties shall then determine how to replace or offset the loss of participation and resources to the Center. Termination by one or more of the parties to this MOU does not alter the terms or obligations of the other parties to this MOU.

XIV. Insurance

Each party hereto acknowledges and understands that the State of California has elected to be insured for its general liability through a self-insurance program. Departments of the State of California are covered by a self-insurance plan for general liability administered by the State Attorney General's Office. All other parties agree to maintain in full force and effect during the term of the MOU and any extension thereof,

commercial general liability insurance, or self-insurance, with limits of not less than \$1,000,000 single limit coverage per occurrence for bodily injury, personal injury and property damage. Upon request from any other party, a party shall provide an appropriate certificate evidencing such insurance, or self-insurance, to the requesting party.

XV. Site Supervision

The Center Manager will be accountable and responsible to the One Stop Operator Consortium for the day-to-day operation and coordination of services and partner staff assigned to the Center. The Center Manager may have lead responsibility over partner staff, to the extent of assigning and reviewing work.

Partner staff that is located at the Center shall remain under the supervision of their employing department for the purposes of performance evaluation and other matters concerning civil service or other employment rights and responsibilities. Partner staff, including state employees, performing services at the Center and satellites shall retain existing personnel, civil service and collective bargaining protections on matters related to employment, including but not limited to, hiring, promotion, discipline, and grievance procedures.

XVI. Hours of Operation

The minimum hours of operation of the Center will be Monday through Friday, 8:00 a.m. to 5:00 p.m. All staff will comply with the holiday schedule of their primary employer and will provide a copy of their holiday schedule to the Center Manager at the beginning of each calendar year.

XVII. Duration and Modification of the MOU

The partners agree that the terms of the MOU will take effect upon signature of both parties and will continue in effect until June 30, 2003, or such time as any partner or partners will modify, extend, or terminate this MOU. Termination of the MOU will be effective in either of two situations:

1. All partners agree in writing to its termination; or
2. One of the partners receives written notification of termination from another partner.

This MOU may be reviewed and renewed annually and modified, altered, or revised, as necessary, by mutual consent of all parties, through the issuance of a written amendment, signed and dated by all parties. Ratification of the request by all the other partners will constitute the modification in question. This MOU constitutes the entire agreement between the parties hereto and no oral understanding not incorporated herein shall be binding on any of the parties hereto.

Memorandum of Understanding
One Stop San Francisco

SIGNATURES

In WITNESS THEREOF, the parties to this MOU execute this agreement.

Dated: _____, 2001

BY: _____
(Signature of Authorized Officer)

Willie L. Brown, Jr.
Mayor

City and County of San Francisco

1 Dr. Carlton B. Goodlett Place, Room 200

San Francisco, CA 94102-4681

(Legal Name of Party)

Dated: _____, 2001

BY: _____
(Signature of Authorized Officer)

Lynn Bunim,
Chairperson, WISF Board

Workforce Investment San Francisco Board

745 Franklin Street, Suite 200

San Francisco, CA 94102

(Legal Name of Party)

Memorandum of Understanding
One Stop San Francisco

Dated: _____, 2001

BY: _____
(Signature of Authorized Officer)

(Name and Title of Authorized Officer)

(Agency or Organization)

(Address)

(City, State, Zip Code)

(Legal Name of Party)

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

December 1, 2003

Dear Colleagues:

Thank you for your interest in participating in our efforts to significantly improve San Francisco's One Stop Career Center System. It is more critical than ever that we continue to develop a shared vision for the local One Stop system; as the Committee of the WISF Board charged with overseeing the operations and services provided through the One Stop system, we are tasked to guide the Board in developing that shared vision.

At a recent meeting of the One Stop Operations and Services Committee, staff presented a draft One Stop Business Plan, as requested in the past by both by this Committee and by the full WISF Board. The draft Plan was presented for discussion and not action, with the Committee members generously providing feedback. On next Monday, December 8th, from 1:00 – 3:00 p.m. at 33 Gough Street, the One Stop Committee will meet for a presentation from staff of the now revised draft Business Plan, and consider feedback from Board members and the community concerning this Plan. The recommendation to approve the Plan appears as an action item on the agenda.

Considering the imperative for a One Stop Plan as articulated at this summer's WISF Board Retreat, we now have the opportunity to take a more strategic approach to delivering workforce-related services to the community. This Plan incorporates proven strategies from successful One Stop best practices across the country and provides the framework for the One Stop system to now transition to a higher level of success. This Plan also provides strategies for strengthening the visibility, performance, and customer satisfaction levels at the One Stop sites so that every resident and every business in San Francisco will consider One Stop a viable solution to their employment-related needs. Through the implementation of the Plan, we will realize greater levels of service to a greater number of workers, while enthusiastically embracing business as our valued partner.

I strongly encourage your review of the enclosed draft One Stop Business Plan. On behalf of the One Stop Committee, I invite your participation at the One Stop Committee meeting on December 8th. More significantly, I look forward to our work ensuring that we more effectively connect businesses and jobseekers through our One Stop Career Center System.

With warm regard,

Handwritten signature of Rosalie A. Bulach in cursive script.

Rosalie A. Bulach
Chair, One Stop Operations and Services Committee

Workforce Investment San Francisco

Local Workforce Investment Board for the City and County of San Francisco

DRAFT MEMORANDUM

TO: ROSALIE BULACH
CHAIR, ONE STOP COMMITTEE

DATE: DECEMBER 1, 2003

FROM: ROBERT SCHWAB, VICE PRESIDENT

SUBJECT: PROPOSED ADOPTION OF THE DRAFT BUSINESS PLAN FOR
WORKFORCE INVESTMENT SAN FRANCISCO'S ONE STOP CAREER
CENTER SYSTEM (AGENDA ITEM 4)

ACTION REQUESTED

Review and approve the attached Draft San Francisco One Stop Career Center System Business Plan January '04 – January '06.

BACKGROUND

An outcome of the August 1, 2003 Workforce Investment San Francisco Board (WISFB) retreat, which focused on the local One Stop system, was the commitment to develop a One Stop business plan. As the planning and oversight committee for the local One Stop Career Center System, the One Stop Operations and Services Committee is asked to take the first step by reviewing the Draft Business Plan and recommending to the WISFB for its consideration and adoption a Business Plan to serve as a guiding document for San Francisco's One Stop Career Center system. Once approved by the WISF Board, it will serve as a guideline for implementing changes at every level of the system.

At the One Stop Operations and Services Committee meeting held on November 17, staff introduced the draft Business Plan, presenting an overview and addressing questions from Committee members. The One Stop Committee provided feedback concerning both content and format of the draft Plan. There was also discussion concerning the timeline for the adoption and implementation of the draft Plan.

Suggested changes in the draft Plan are reflected in the attached version of the draft. The narrative section remains virtually unchanged, with the exception of some minor grammatical adjustments. The Change Grids were changed to reflect Committee members' suggestions that there be a clearer depiction of the goals, as well as subsequent actions. Those revisions to the Change Grids are underlined. Committee members also suggested that the Progress Grid should depict the actions required to achieve the goals, the parties responsible for the actions, and the projected dates for completion of the actions. Staff will begin the process of completing the Progress Grid

with the goals and actions and present that version of the Progress Grid at the meeting on December 8th. The Progress Grid will then be updated regularly and presented at all future One Stop Committee meetings.

Included in the materials related to this agenda item are the following items:

- The narrative section of the Plan, with the addition of the proposed changes list
- The Change Grids, with proposed changes underlined
- A blank copy of the Progress Grid

In addition to distribution of the materials to all WISF Board members, there has been significant effort to engage members of the employment and training community in the planning process. There was an announcement and discussion at the most recent meeting Committee of the Community Agencies concerning the draft Plan, with staff urging all interested parties to attend the One Stop Committee meeting on December 8th.

RECOMMENDATION

It is recommended that the One Stop Operations and Services Committee review and approve the draft Business Plan for the One Stop Career Center System.

Staff will be available at the meeting on December 8th to answer your questions.

Attachment

DRAFT

SAN FRANCISCO ONE STOP CAREER CENTER SYSTEM

BUSINESS PLAN
JAN '04 – JAN '06

INTRODUCTION

This draft Plan offers a response to requests from the One Stop Committee for a "business plan" for the local One Stop system, to be drafted by staff that would take the approach of writing a conventional business plan. What staff discovered fairly early on is that applying business planning principles to a public sector system doesn't necessarily work. The One Stop system is not a business in the traditional sense but instead, a network of services with a wide range of customer groups, staff workplace cultures, and modes of delivery. Compounding this complexity, we also realized that with each unfolding layer of planning came objectives that needed to be applied consistently to the corresponding layers of governance, management, and operations. This alone made it difficult to accurately or comprehensively plot the path to the goals. Therefore, while this plan does not detail every point of approval and execution for each suggested change, it does serve as the starting point for an ongoing planning process, with other opportunities for requesting business plans to emerge as the implementation unfolds.

In drafting the plan, staff considered and incorporated lessons learned through key WISF processes occurring in the past two years, including the WISF Board Retreats, the WISF Employer Forums, and the Greg Newton training sessions. Many of the objectives in the Plan are shaped by the priorities established through these Board processes. Staff has also conducted extensive research and analysis of best One Stop practices around the country and State, by attending conferences as well as through communicating with and collecting data from other areas. Key to the drafting of the plan was the well-considered application of extensive One Stop and workforce development expertise made available to staff. Immersed in what has essentially been an intensive training on how to design a One Stop system that is customized for our community, we believe that this Plan provides a realistic strategy for transitioning toward an effective model for San Francisco.

Attempting to get to the root of local One Stop system issues that have been problematic or inadequately addressed in recent years, the Plan begins by (again) summarizing core WIA One Stop principles and values, followed by a brief analysis of San Francisco's current economic environment. Serving as the basis for then identifying where in the current system the principles are not supported, the Plan then suggests solutions that will create reforms throughout the system. The reforms include:

- A realignment of management that requires modified or new policies and processes for operating One Stop Centers;

DRAFT

- New strategies for maximizing resources that go beyond examining just WIA funding, toward establishing a planning process that considers the use of funds from multiple sources;
- A requirement for meeting expectations for integrating services, measuring customer satisfaction and establishing performance measures throughout the system.

While this Plan does provide a strong rationale for why reforms are needed, we emphasize that it is the clarity of the vision, innovation of practice, and integrity of process at every level that is required for its successful implementation. More than a business plan, it is a plan for change, signaling the beginning of a major transformation for not only the WISF Board's service delivery platform but for the Board's support system as well. Perhaps most importantly, the Plan serves as a "call to action" to the local employment and training community, an opportunity to bring about positive reforms and promote innovative practices, and an invitation to participate in a high quality system of integrated services that rewards collective and individual entity excellence.

THE WORKFORCE INVESTMENT ACT MANDATE

WIA reforms Federal job training programs and creates a new, comprehensive workforce investment system. The reformed system is intended to be customer-focused, to help Americans access the tools they need to manage their careers through information and high quality services, and to help US companies find skilled workers. This law embodies seven key principles, as follows:

- Streamlining services through better integration in the One-Stop delivery system. Programs and providers co-locate, coordinate and integrate activities and information
- Empowering individuals
- Universal access
- Increased accountability
- Strong role for local workforce investment boards and the private sector, with local, business-led boards focusing on strategic planning, policy development and oversight of the local workforce investment system.
- State and local flexibility
- Improved youth programs

The Department of Labor considers the reforms embodied in the Workforce Investment Act to be pivotal, providing an unprecedented opportunity for major reforms that can result in a reinvigorated, integrated workforce investment system. States and local communities, together with business, labor, community-based organizations, educational institutions, and other partners, must seize this historic opportunity by thinking expansively as they design a customer-focused, comprehensive delivery system.

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WIA AND THE ONE STOP CONCEPT

The cornerstone of the workforce investment system is One Stop service delivery, which unifies numerous training, education and employment programs into a single, customer-friendly system in each community. The underlying notion of One Stop is the coordination of programs, services and governance structures so that the customer has access to a seamless system of workforce investment services. We envision that a variety of programs could use common intake, case management and job development systems in order to take full advantage of the One-Stops' potential for efficiency and effectiveness. A wide range of services from a variety of training and employment programs will be available to meet the needs of employers and job seekers. The challenge in making One-Stop live up to its potential is to make sure that the State and Local Boards can effectively coordinate and collaborate with the network of other service agencies, including TANF agencies, transportation agencies and providers, metropolitan planning organizations, child care agencies, nonprofit and community partners, and the broad range of partners who work with youth. (20CFR Part 652)

Key to the development of the system is collaboration among partners to create a seamless system of service delivery. Individuals may gain access to this seamless system through a variety of ways. However, local areas are required to establish at least one comprehensive physical center in their area that will provide access to core services and additional information from the required partner programs. If an individual seeks assistance from an affiliated site or from an individual partner program, they should be served and also receive information about how and where they may obtain other services available through the One Stop system. The Department of Labor is advocating a common sense approach to ensuring that individual are served regardless of their first contact with the education and workforce development community. This is consistent with the "no wrong door" approach set forth in the Act.

The key to establishing an effective local system that serves both participants and employers is to develop effective linkages between the partners and the sites operating within the system. While the WIA only requires one physical site and the participation of certain partners, the goal of the legislation is to create a system that encompasses all of the various programs and providers in the community.

- THE ONE STOP GUIDE TO THE FINAL REGULATIONS, BY MICHAEL BAUSTEIN, ESQ., & JENNIFER M. VASTA, ESQ.

SAN FRANCISCO'S WORKFORCE DEVELOPMENT NEEDS AND OPPORTUNITIES

In September 2003, there were 25,200 unemployed persons in San Francisco, a rate of 6%. While this is a decline from a recent high of 7.7% in July of 2002 and we are beginning to see signs of a growing economy, the number also reflects a shrinking of the local labor force. Many consider local policies and costs to be unfriendly to doing business in San Francisco. Nonetheless, many also consider the quality of the workforce to be among the City's business strengths and noted economists predict economic growth to continue well into the future.

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A large percentage of San Francisco's population immigrated from a non-English speaking countries and that trend is expected to increase. With declining birthrates, the nation is expected to face severe labor shortages in the coming years with the immigrant population playing an increasingly important role in meeting labor demand.

The combined forces of an improving economy, predicted labor shortages, and San Francisco's position as the arrival city for a large immigrant population provides the unique challenge of preparing its incumbent and newly arriving workforce with the information about future opportunities and the resources to obtain the skills to fill them, while producing a ready workforce for employers who will struggle to keep doing business in our community, especially if that workforce is not available or able to meet rapidly changing employer demands.

What we know about employers is their demand for workers with strong communication, social, customer service, and problem solving skills who are ready to work and are ready to learn. We also know employers want workers that have a strong work ethic and are able to effectively manage their personal lives in a way that does not interfere with the work place. Finally we know that in general, employers favor job training over occupational skills training.

While skill acquisition is a core issue for employers and the workforce, an effective workforce development system will maximize outcomes for customers and resources through the provision of quality labor market information, career guidance, and financial aid options. The cycle of service aims to simultaneously help people prepare for emerging jobs while helping employers develop anticipated workforce needs, supporting the economic success of both local businesses and individuals.

FACING CRITICAL CHALLENGES

Today's local economic climate faces enormous challenges, including declining resources, escalating costs of living and workforce housing, increasing exportation of jobs, and maintaining a business presence in San Francisco. For the workforce development community, there is the struggle with the decision to work collaboratively with other agencies in a way that may benefit the customer and be more efficient, but may also result in a loss of revenue to the individual organization.

The Dept. of Labor challenge to local Boards provides a rationale that states business as usual is too costly, compromises our effectiveness, and is unfair to the customer. Meeting the challenge requires strong effective leadership and some hard choices. The Workforce Investment Act requires business-led Boards so that the private sector can participate in the process, as public entities resolve the issues that impede the creation of a streamlined, better integrated, more effective system that empowers individual customers and attracts and grows greater opportunity through relevant employer services.

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ENVISIONING A ONE STOP SYSTEM FOR SAN FRANCISCO

We envision a San Francisco where all persons have the information, tools and resources to realize their employment potential, where employers have a skilled and productive workforce and where both contribute to a thriving and growing local economy that provides the greatest range of opportunity and quality of life for all. A community's workforce development system is far reaching and serves all job seekers, both employed job changers and the unemployed; training seekers; resource seekers; employers, and youth representing the future workforce.

At the heart of this workforce development vision for San Francisco is a highly visible, showcase Career Center system, built upon a one-stop concept, that is a state of the art collaboration of partners offering comprehensive and high quality career-related information, services, resources, skill acquisition and enhancement, driven and valued by our customers and linked to our community's economic development efforts.

One Stop service delivery is important because our customers demand, and the citizens of our community deserve, comprehensive and effective workforce services provided in a streamlined, integrated and customer-focused manner. It is important that job or training seekers no longer have to seek out literally dozens of career-related services or resources to meet their needs, and it is equally important that the employer community be able to access a vast array of workforce solutions through a single point of contact that navigates the system for them. Finally, it is important that precious public resources deliver real value for the customer with an efficiency that engenders strong taxpayer support.

Core to the One Stop vision, the following value statements provide the foundation for proposed changes in the Plan and have helped to refine the current policies and processes relevant to the successful service delivery. The value statements are:

- Career choice is a highly personalized life decision; therefore, at each and every point in the system our customers will be provided complete and objective information about the full range of options available to them and their right to exercise that choice.
- The foundation of a successful employment experience for both worker and employer is the "best match" between job/workplace requirements and the interests, skills, abilities and aptitudes of employees; therefore, our ability to provide that "best match" will be a measurement of the system's ability to create that experience.
- Diversity is the foundation of our society and the strength of our nation, economy, workforce and individual workplaces; therefore, services will be designed and delivered with consideration of the diverse needs of our community.
- Resource allocations will be driven by labor market needs data; therefore, investment decisions will target those activities that yield the best return in job quality and economic growth.

The following pages constitute the section of the plan that proposes specific changes, objectives, and actions to be taken for the System.

PROPOSED CHANGES

1. The WISF Board participates in the planning and development of the budgets of those partner funding sources identified in the WIA, in support of the challenge to maximize coordination of public workforce development efforts, deploy resources with integrity, and invest wisely and strategically.
2. The WISF Board participates in the planning of mandatory One Stop partner programs, as identified in the WIA, in support of the challenge to design services based on objective market research and customer needs.
3. WISF Board releases Request for Business Plans for One Stop Center Operations.
4. The One Stop System creates a relevant, business-like employer services capacity, employing “single point of contact” and “system navigator” concepts.
5. The One Stop System establishes an income-producing division of One Stop system, based on WIA fee-for-service concept.
6. The One Stop System maximizes informed customer choice by providing complete information about the full range of services and financial assistance available.
7. The One Stop System launches unified and comprehensive marketing campaign to inform and attract diverse customer segments.
8. The One Stop System matches the individual customer need with appropriate service tier and service funding source to optimize customer outcomes and maximize resources.

PROPOSED CHANGE

1. The WISF Board participates in the planning and development of the budgets of those partner funding sources identified in the WIA, in support of the challenge to maximize coordination of public workforce development efforts, deploy resources with integrity, and invest wisely and strategically.

BENEFITS

- Drives service integration, reduces duplication and costs
- Builds on existing funding, resources, and staff
- Identifies present and missing resources
- Provides incentives for contribution and buy-in

CHALLENGES*current system*

Accurate depiction of partner funding and resources does not exist;

Lack of consensus about shared costs

No State-approved method for calculating each partner's share of costs currently exists

Maze of financial transactions confuses who is contributing what

SOLUTIONS GOALS*future system*

~~Compile funding and resource matrix based on data from~~ To map One Stop funding and resources with all partner agencies

~~B~~ To base One Stop funding on customer need and market analysis

~~I~~ To identify and approve shared costs

~~Develop~~ To develop cost allocation plan with resource sharing agreement

~~M~~ To maintain integrity and transparency – no "side deals"

POTENTIAL OBJECTIVES ACTIONS**WISF BOARD**

- Develop formula based on analysis of both customer need and labor market need for funding the local One Stop Career Center System
- Set expectations & establish guidelines for planning One Stop Center budgets, sharing costs, and deploying resources
- Conduct reviews of budgets of those partners whose organizations are direct recipients of public employment and training funds
- Compile funding and resource matrix based on data from all partner agencies
- Devise formula for determining investments to One Stop System
- Implement cost allocation plan for determining and sharing costs
- Conduct ongoing reviews of costs and expenditures for the Centers

CENTER OPERATOR(S)

- Provide accurate depiction of all Center costs and how they are shared, as defined in resource sharing agreement
- Provide an overall activity budget with line-item detail in required reports
- Provide justification of need for costs and methodology used to derive costs
- Negotiate resource sharing agreements with partners in Center
- Identify fiscal manager for Center and define responsibilities

PARTNERS

- Provide relevant up-to-date information concerning funding, resources, and costs

2. The WISF Board participates in the planning of mandatory One Stop partner programs, as identified in the WIA, in support of the challenge to design services based on objective market research and customer needs.

BENEFITS

- Addresses the needs of the community and best use of resources
- Cultivates creative and innovative partnerships
- Provides rationale supported by data and customer feedback

CHALLENGES

current system

Services provided in the One Stops are not based on analysis of need

Accurate depiction of partner services and staffing does not exist

Ad hoc strategies for mixing, leveraging, and sharing resources for services

SOLUTIONS GOALS

future system

~~Re~~To re-determine services delivered through the One Stop based on market analysis & need

~~To Compile~~ compile a comprehensive services and staff matrix based on data from all partner agencies

~~To One Stop partners convene to review and renew MOU with WISF Board execute formal agreements with One Stop partners~~

POTENTIAL OBJECTIVES ACTIONS

WISF BOARD

- Set expectations for coordinating and integrating services, to include shared common practices and tools
- Re-determine services delivered through the One Stop based on market analysis & need
- Convene partners to review and plan service integration, using service matrix to eliminate duplication, fill gaps, and identify missing services
- Re-negotiate and execute partner MOUs with mandatory partners
- Compile services and staff matrix based on data from all partner agencies
- Deploy swipe card technology at all Centers and establish requirements for reporting
- Determine performance measures for the Centers and determine evaluation process
- Institute customer satisfaction standards for Centers and establish methodologies for surveying customers

CENTER OPERATOR(S)

- Be responsible for attaining the prescribed standards for delivery of One Stop Career Center services
- Generate consistent monthly reports on services provided in the Center
- Coordinate integrated services in Center using prescribed quality continuous improvement and customer satisfaction processes and provide reports to the Board

PARTNERS

- Participate in integrated service delivery processes for the Centers, including continuous improvement and customer satisfaction

3. WISF Board releases Request for Business Plans for One Stop Center Operations.

<p align="center">BENEFITS</p> <ul style="list-style-type: none"> Establishes One Stop performance benchmarks Promotes consistency of services and processes in all Centers Results in highly satisfied customers Incorporates customer and staff feedback Prepares SF for One Stop certification process 	
<p align="center">CHALLENGES current system</p> <p>No current plans exist for One Stops</p> <p>Operator lacks objectivity due to alignment with partner (rather than One Stop) mission</p> <p>Poor integration and streamlining of services</p> <p>Lack of clarity and accountability</p>	<p align="center">SOLUTIONS GOALS future system</p> <p>WISF Board issue <u>To issue s a</u> request for business plans to manage and operate One Stop Career Centers</p> <p><u>R To operate Center</u> require evidence of ability to take a neutral and objective approach</p> <p><u>R To equire evidence of ability to integrate</u> and streamline services</p> <p><u>E To establish benchmarks and evaluation</u> goals</p>
<p align="center">POTENTIAL OBJECTIVES<u>ACTIONS</u></p> <p>WISF BOARD</p> <ul style="list-style-type: none"> Request Business Plan(s) from current Operator(s) Develop process and timeline for future Operator solicitation Develop criteria for Request for One Stop Center Business Plan(s) Incorporate performance measures & incentive/corrective action levels Provide guidelines for marketing, technology, capacity building, and other <u>Require evidence of ability to take a neutral and objective approach</u> <u>Require evidence of ability to integrate and streamline services</u> Identify partnership and revenue generating opportunities Conduct ongoing evaluations of process and operations <p>CENTER OPERATOR(S)</p> <ul style="list-style-type: none"> Respond to Request for Business Plan(s) Enforce agreed-upon terms of MOUs and report progress to Board Be responsible for implementing the prescribed performance measures Cultivate new partnerships as directed by the WISF Board <p>PARTNERS</p> <ul style="list-style-type: none"> Make appropriate staff assignments to Centers 	

4. The System creates a relevant, business-like employer services capacity, employing "single point of contact" and "system navigator" concepts.

BENEFITS

- Added values for employers = accessible, personalized, economical
- Offers employers short-term solutions while supporting long-term productivity
- Provides portal to a wide range of solutions & expertise
- Facilitates linkage to other workforce intermediaries

CHALLENGES *current system*

Jobseeker traditionally seen as client
Business perceives government services as difficult to access and navigate
General inexperience with meeting business needs on business' terms;
Little or no marketing savvy or resources.

SOLUTIONS GOALS *future system*

~~R~~ To recognize employers as valued providers of jobs and the engine for economic growth
~~Designate~~ To designate a Business Liaison as single point of contact & system navigator
~~Develop~~ To develop protocols for serving businesses
~~Market~~ To market to employers in their "language", not "bureaucrat-ese"

POTENTIAL OBJECTIVES **ACTIONS**

WISF BOARD

- Establish policies & identify resources for employer services
- Set expectations and clarify roles for serving employers
- OS & Employer Services Committees to collaboratively draft plan for OSSF Business Services
- Designate Business Liaison as single point of contact & system navigator
- Market to employers in their "language", not "bureaucrat-ese"

CENTER OPERATOR(S)

- Ensure that Centers interact w/ employers according to WISF Board guidelines
- Participate in OSSF Business Services development
- Collect and report data on employer customer and services received

PARTNERS

- Be willing to give up individual identity & employer contacts for greater good
- Identify individual staff with expertise in business practices or specialization
- Participate in development of policies, protocols and referral process for employers

5. The System establishes an income-producing division of One Stop system, based on WIA fee-for-service concept.

BENEFITS

- Springboard for piloting new processes and partnerships for the system
- Generates new revenue and resources, less dependency on government funding
- Provides positive proof of demand for our services
- Profits attract new customers, partners, and resources to the system
- Profits provide incentives for making more profits

CHALLENGES current system

No plan for transitioning to fee-based services

System not equipped to charge, process, or administer fees

Making the leap from no-cost to some-cost represents shift in organizational culture

SOLUTIONS GOALS future system

~~Convene taskforce of partners, cbo's, consultants, etc. to develop a plan for piloting fee-based services~~

E To explore partnerships for fee-sharing and revenue generation

D To develop general system priorities and protocols for assessing fees to services

POTENTIAL OBJECTIVES ACTIONS

WISF BOARD

- Establish policy for administering a fee-based or fee-shared service through One Stop Centers or system, for employers and jobseekers
- Research best practices on successful examples in other areas
- Utilize relationships with staffing firms and other for-profit human resource service providers to gauge competition, identify what's unique about our offer, market to customers
- Convene taskforce of partners, cbo's, consultants, etc. to develop plan, priorities, and protocols for piloting fee-based services

CENTER OPERATOR(S)

- Implement delivery of fee-based services as directed by WISF Board, if applicable
- Identify potential opportunities for generating revenue through the Center
- Survey Center customers to measure interest and need

PARTNERS

- Participate in planning and integrating fee-for-service strategies
- Encourage staff to propose ideas for fee-for-service

6. The System maximizes informed customer choice by providing complete information about the full range of services and financial assistance available.

BENEFITS

- Provide objective and neutral information to all customers
- Provides a complete range of options available
- Promotes One Stop in the role of "neutral broker"
- Builds probability of success for customer, by providing full access to the most appropriate solutions to that customer's unique needs
- Gives providers with best performance added incentives for success

CHALLENGES current system

System is self-referring, proprietary, and often seen as an "insider game"

Subcontractors focus on recruiting, not cross-referring;

No agreed-upon system exists for providing information or making referrals

Customers' route to most appropriate service is often indirect or misconnect

No method for assessing quality of referral

SOLUTIONS GOALS future system

Set To establish clear expectations for One Stop to promote maximized customer choice;

To fully Inform all customers of their right to choose and provide with a full range of choice

To conduct ongoing cross-training and use agreed-upon cross referral process

To map Map customer flow process throughout system to plot points of appropriate referral

To define process for evaluating success with providing maximized customer choice

POTENTIAL OBJECTIVES ACTIONS

WISF BOARD

- Set expectations for One Stops to promote maximized customer choice
- Map customer flow and distribute to Centers and affiliates
- Define process for evaluating each Center's success with providing choice

CENTER OPERATOR(S)

- Inform all customers of their right to choose
- Provide customers with a full range of choice without giving favoritism to an individual entity or program
- Coordinate ongoing partner cross-training and use agreed-upon cross referral process

PARTNERS

- Make appropriate staff assignments to Centers, as agreed upon in MOUs
- Participate in cross training plan and cross referral process
- Inform all Center and partner staff of customer choice policy

7. The System launches unified and comprehensive marketing campaign to inform and attract diverse customer segments.

BENEFITS	
<ul style="list-style-type: none"> Provides a clear brand identity and a message that sparks customer attention Builds affiliates' capacity to generate alternative funding by creating increased awareness of their programs through affiliation with system Communicates value to customer, <u>not</u> long lists services and/or partners 	
CHALLENGES current system	SOLUTIONS GOALS future system
Belief that marketing is accomplished by distributing a brochure	Conduct a "Marketing 101" primer to <u>To</u> inform, enlighten, and educate about marketing
Marketing project repeatedly delayed by complications and hurdles	Designate project manager for One Stop system marketing campaign <u>To establish accountability for marketing the system</u>
Concerns about cultural competency and ability of consultants to address need	<u>To Require proponents show evidence of address marketing project with appropriate</u> cultural competency & experience with diverse communities
Inaccessible and onerous procurement process.	<u>Procurements To insure that procurements to be</u> conducted by procurement staff
POTENTIAL OBJECTIVES <u>ACTIONS</u>	
WISF BOARD <ul style="list-style-type: none"> <u>Conduct a "Marketing 101" primer</u> Set expectations for system components, including Centers and affiliates, re: standards of affiliation, graphic standards, use of logo, marketing guidelines, etc. Provide the leadership and commitment of resources, staff, and Board buy-in Appoint staff lead or team to manage project 	
CENTER OPERATOR(S) <ul style="list-style-type: none"> Attend training or presentations to inform about marketing Observe marketing policies established for the system Identify Center- or event-specific marketing needs for each Center Provide customer data for system customer satisfaction surveys Recommend strategies for marketing Centers 	
PARTNERS <ul style="list-style-type: none"> Actively participate in the marketing project Exercise co-branding with One Stop system when appropriate 	

8. The System matches the individual customer need with appropriate service tier and service funding source to optimize customer outcomes and maximize resources.

BENEFITS	
<ul style="list-style-type: none"> Offers access to core, intensive, and training services Exposes customer base to all tiers in WIA service to determine what services are sufficient to facilitate employment for jobseekers Customer driven, customer focused, customer personalized Higher probability of customer satisfaction & customer success 	
CHALLENGES current system	SOLUTIONS GOALS future system
Current system of group-based contracts does not provide incentives for non-training outcomes or diversified funding.	Design service strategy for addressing each <u>To address the needs of the individual customer need, not for meeting enrollment goals</u>
WIA certification requires complex process, with customer going to several different locations	To Locate mandated program enrollment staff in Centers and eliminate need for multiple visits <u>To Create mechanism to determine eligibility for intensive services in the Centers</u>
WIA funds for training accessed before exploring viable intensive solution	To Enforce mandate to provide assistance with other forms of financial aid before using WIA training funds <u>To Establish complementary priorities for Board and its Committees</u>
No mechanism in place for ensuring that other forms of financial aid are exhausted before using WIA funds	
POTENTIAL OBJECTIVES ACTIONS	
WISF BOARD <ul style="list-style-type: none"> Set expectation for meeting mandate to provide eligibility, full range of choice, and financial aid for training Incorporate requirements in Request for Business Plan criteria <u>Design services for addressing customer need, not for meeting enrollment goals</u> <u>Enforce mandate to provide assistance with other forms of financial aid before using WIA training funds</u> 	
CENTER OPERATOR(S) <ul style="list-style-type: none"> Incorporate process for identification of need for intensive services, supportive services, or training Describe process for identifying and referring to partner programs Provide description of how customers flow through the tiers of services 	
PARTNERS <ul style="list-style-type: none"> Station staff responsible for eligibility in Centers Participate in customer flow mapping activities, both flow within the Centers and flow throughout the system 	

PROGRESS GRID FOR ONE STOP SYSTEM PLAN

	1 st Quarter Jan/Feb/March '04	2 nd Quarter Apr/May/June '04	3 rd Quarter July/Aug/Sept '04	4 th Quarter Oct/Nov/Dec '04	1 st Quarter Jan/Feb/March '05	2 nd Quarter Apr/May/June '05	3 rd Quarter July/Aug/Sept '05	4 th Quarter Oct/Nov/Dec '05
WISF BOARD								
Policy and Vision EXECUTIVE COMMITTEE								
FINANCE SUB-COMMITTEE								
Funding and Resources								
PROGRAM RESOURCES								
Subcontracts								
EMPLOYER SERVICES								
Services to businesses								
ONE STOP OPERATIONS AND SERVICES COMMITTEE								
Operations & Services								
BOARD STAFF / SYSTEM OPERATOR								
Administration/Operations Planning/Implementation								
PARTNERSHIP								
Mandatory partners								
Other partners								
Contribute services/resources								
CENTER OPERATOR(s)								
Integrate Services								
Deploy Resources								

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

**DRAFT MINUTES OF THE
DECEMBER 8, 2003 MEETING OF THE
ONE STOP COMMITTEE OF THE**

WORKFORCE INVESTMENT SAN FRANCISCO BOARD

DOCUMENTS DEPT.

JAN - 2 2004

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The meeting was held in the Auditorium of San Francisco Community College District Office located at 33 Gough Street in San Francisco, California 94103.

PRESENT:

William Allen (2:30), Jim Buick, Rosalie Bulach, Kathye Citron, Nicholas De Lorenzo, Devra Edelman, Phyllis McGuire, Craig Newmark, Victor Revenko, and Darlene Rutkowski

ABSENT:

Abby Snay

STAFF:

Cheryl Bertrand, Jenny Chen, Alice Chiu, Cathy deCristofaro, Sean Hallisey, Karen Hart, Lucia Hughes, Roy Li, Tony Ng, and Robert Schwab

PUBLIC:

Dan Brajkovich, Terri Feeley, Gwen Henry, Greg Johnson, Bernard Leung, Tony Lugo, Janetta Nartey, Cleo Reese, Tom Ryan, Eileen Tompkins, Jim Torrens, Tara Wolfson, Jonathan Yorba

The meeting was convened at 1:05 PM with a quorum established.

Chair Rosalie Bulach amended the agenda to switch items 3 and 4 to consider Item 4 prior to consideration of Item 3.

Motion to adopt the amended agenda was made by Darlene Rutkowski and seconded by Kathye Citron.

Ayes: Jim Buick, Kathye Citron, Nicholas De Lorenzo, Devra Edelman, Phyllis McGuire, Craig Newmark, Victor Revenko, and Darlene Rutkowski

Nays: None

Abstentions: None

Motion passed.

Chair Bulach asked that public testimony be taken at the time of the agenda item.

Item 4 – One Stop Business Plan

Pamela Calloway, Chief of Staff to WISF Board, addressed the recommended draft business plan. She discussed the chronology of this project and reminded the Committee that at the August Board retreat, the Board devoted an entire day to discuss the San Francisco One Stop System. The agenda was driven by the Board's past work to articulate a vision and values for the System. The Board asked the One Stop Committee to guide the Board in developing that shared vision. At the September One Stop Committee meeting, Chair Bulach asked staff to draft a business plan for the System to serve as a planning tool and as a clear statement of the vision to build a "showcase" One Stop System. Staff was asked to complete the draft plan by December 31, 2003. The Committee directed staff to use the retreat's accomplishments as the foundation for the plan and to research "promising practices" from other cities. At the November meeting, staff presented a first draft of the plan. Since the November meeting, the draft plan has

been discussed with the Committee of Community Agencies, One Stop Operator Consortium Directors, and with many other stakeholders.

Ms. Calloway expressed gratitude for feedback on the Plan and directly addressed four categories of concerns expressed in comments received. First, she referred to Item 3 in the plan and noted that some individuals felt that Item 3 criticized the way One Stop Centers are currently operated. Ms. Calloway stated that Item 3 was inartfully and inappropriately written through statements of opinion rather than articulation of standards of service required by the Board. Item 3 should have described a process by which the performance of the Operator is evaluated by the Board (through its One Stop Committee) pursuant to setting clear goals and benchmarks. She offered a new draft language for Item 3.

She stated that this experience illuminated confusion about the various roles of the Private Industry Council, Inc. in the System. Therefore, in order to be an "honest broker" as requested by the Mayor, the PIC has withdrawn from the One Stop Operator Consortium. PIC will continue to provide support to the Board and increase its staff and service presence at the Centers. The PIC will continue to participate in the Operations Committee(s) at the Centers and will continue to invite and welcome the assistance of their partners' staff to provide support to the Board and its Committees.

Ms. Calloway addressed the second concern: why does the Board, suggested in Items 1 and 2 in the Plan, participate in the planning and development of budgets of Partners' funding sources. She reminded the Committee of the results of both 2002 and 2003 Board retreats. The Board encouraged integration, collaboration and coordination of services and funding among Partners to ensure that we both leverage scarce resources and provide the best services to both job seekers and employers through the One Stop System. She pointed out that each of the Partner agencies are represented on the Board as a result of the receipt of federal dollars for employment and training in San Francisco. She gave an example of the Youth Council who has engaged in this collaborative and complimentary process among youth funding agencies. There isn't a substitution of Youth Council decision-making, ability or authority but those individual agencies have engaged in a process that both shares information about their decision-making process and what those decisions are.

The third concern raised was whether or not "customer choice" as expressed in Item 6 is a euphemism for eliminating group-based cost reimbursement contracts. She emphasized that that is not the case and stated that staff strongly recommends "no one size fits all". She recommended that the Committee "buy in bulk" wherever appropriate.

And the fourth concern raised is why is the One Stop Committee considering this plan before the Board has voted on the "off the table" issues from the previous retreat. Ms. Calloway reminded the Committee that they are the Board and the Committee makes decisions in compliance with the will of the Board. If the Board later changes or refines its policies and perspectives that may impact the plan, the Plan will then change accordingly.

Ms. Calloway concluded by expressing enthusiasm that the draft plan is a tremendous opportunity for this Committee and the Board to demonstrate leadership in building this important resource for San Francisco. She also thanked the Committee for their hard work and urged that they see this task through completion. She suggested that the Committee may wish to table action until its next meeting on either the draft or on those provisions about which there is strong disagreement.

Robert Schwab presented the draft plan and its eight proposed innovations, making references to past Board retreats, Committee work and the San Francisco five-year plan. He answered questions from the Committee and public.

Public Testimony

One Stop Operator Consortium

Jim Buick commented that the Consortium does recognize that there are areas that need improvement, however, the Consortium took the criticism of the Centers as an insult. In the first draft, there weren't accurate depictions of the Partners' share in the System, referring to innovation #1. He pointed out that only 5% of the pie is WIA funds and the Partners provide the remaining 95%. The plan also suggests that there aren't any plans for the System, which is not the case. The plan also suggests poor integrations. He informed the Committee that the Partners' staff at the Centers meets weekly. He added that the criticism undermines the progress being made.

Chair Bulach expressed that she is pleased to hear that there is communication between the different entities.

Craig Newmark suggested that the criticism are not criticism specifically but miscommunication and frustration.

Chair Bulach restated that staff have begun the business plan drafting process since September at this Committee's request. If the Partners had concerns, they should have been more active in the development of the plan.

Victor Revenko asked what are the next steps to be or can be taken at this point.

John Poremba replied that benchmarks need to be set and added that he sees Innovation #1 as a criticism of the Committee, not of the Operator Consortium.

Darlene Rutkowski asked why is there a challenge box on the proposed changes document. Mr. Schwab replied that it was provided to better inform the Committee of the past challenges and it is not intended to be in the plan.

Public Testimony

Jewish Vocational Service/Committee of Community Agencies

Jim Torrens expressed appreciation of the attention to the semantic concerns. He noted that Access Points are not included in the plan and he wanted to encourage the Committee to consider best practices. He recommended that Board solicit more input from various entities in the System.

Access Point Committee

Devra Edelman expressed a couple of concerns: (1) lack of definitions of "partners" in the Plan as Access Points are partners in the System; and (2) lack of definition of "prioritization of services".

Mission Language and Vocational School

Dan Brajkovich also voiced several concerns: (1) there is traffic in the CBOs and not just the Centers. The CBOs provide service levels; (2) the word "showcase" implies that the product simply "looks" good. Where does it say that the people are being served?; (3), where are the risk factors? Every plan should have risk factors; (4) who is the targeted population? Who are

you affecting?; (5) Where is the funding coming from? From Providers?; and (6) What is the system of delivery?

Craig Newmark suggested that those who provided public testimony provide assistance in formatting an addendum to the draft plan and move forth with the adoption of the draft plan today.

Nicholas deLorenzo asked if Mr. Brajkovich is suggesting there be CBO presence in the Centers. Mr. Brajkovich replied yes and that Access Points' role in the System should be clearer.

Darlene Rutkowski commented that it is a matter of terminology in the plan.

Chair Bulach suggested that the Committee approved the draft plan and then form a working group to focus on making changes to the plan.

John Poremba disagreed; the Committee should not adopt the plan until there is an inclusive process for input.

Nicholas deLorenzo suggested that the item be tabled.

Mr. Schwab commented that the plan is not intended to address all policy decisions of the Board and the plan does designate target population [addressing one of Mr. Brajkovich's concerns].

Mr. Poremba asked what is the relationship between the presented draft plan and the Strategic Five Year Plan. He also asked if the Five Year Plan was overdue for amendments and the concerns brought forth today should be addressed in the Five Year Plan as well.

{Craig Newmark leaves at 2:35 PM}

Ms. Rutkowski suggested including the One Stop System definitions adopted by the Board in the Plan.

Phyllis McGuire expressed her opposition to adopting the plan stating that the Committee should continue to work on the plan and set a deadline for that to be done.

Chair Bulach stated that this project has been "under construction" for four months (since September). Staff should incorporate all the comments made at this meeting and she asked the following Committee members to assist staff in analyzing comments and preparing the next draft of the Plan: John Poremba, Devra Edelman and herself. *(Note that Chair Bulach later declined to provide this assistance to staff due to time and workload constraints)*

Robert Schwab asked that anyone who wanted to provide input should do so by citing the section of the Plan that they consider objectionable and proposing replacement language. All input should be submitted in writing to Cathy deCristofaro by close of business on Monday, December 15th.

Motion to provide Committee member assistance to staff (John Poremba, Devra Edelman, and Rosalie Bulach) to make changes as submitted in writing by various parties (deadline: December 15th) and bring back a revised draft plan to the committee for approval was made by Phyllis McGuire and seconded by Jim Buick.

Ayes: William Allen, Jim Buick, Kathye Citron, Nicholas De Lorenzo, Devra Edelman, Phyllis McGuire, Victor Revenko, and Darlene Rutkowski

Nays: None

Abstentions: None

Motion passed.

Item 3 – Memoranda of Understanding

Darlene Rutkowski briefly presented Department of Rehabilitation's revised Memoranda of Understanding (MOU).

Motion to adopt Department of Rehabilitation's revised MOU was made by Jim Buick and seconded by Kathye Citron.

Ayes: William Allen, Jim Buick, Kathye Citron, Nicholas De Lorenzo, Devra Edelman, Phyllis McGuire, Victor Revenko, and Darlene Rutkowski

Nays: None

Abstentions: None

Motion passed.

Motion to adopt the remaining MOU was made by Jim Buick and seconded by William Allen.

Ayes: William Allen, Jim Buick, Kathye Citron, Nicholas De Lorenzo, Devra Edelman, Phyllis McGuire, Victor Revenko, and Darlene Rutkowski

Nays: None

Abstentions: None

Motion passed.

Chair Bulach asked that the presentation of the results of the San Diego field trip and best practices be tabled to a future meeting. John Poremba asked that the presentation or information regarding the best practices be forwarded to the Committee to assist in the revision of the plan.

Future Agenda Items

Darlene Rutkowski asked that the One Stop Accessibility Work Group Report be added to the next agenda.

Motion to adjourn the meeting was made by Victor Revenko and seconded by William Allen.

Ayes: William Allen, Jim Buick, Kathye Citron, Nicholas De Lorenzo, Devra Edelman, Phyllis McGuire, Victor Revenko, and Darlene Rutkowski

Nays: None

Abstentions: None

Motion passed.

The meeting was adjourned at 3:05 P.M.

